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Distribution Study of Grocery Store Sales

Fairchild Fashion & Merchandising Group
New York

SN'92

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Standard Book Number: 87005–761–8
Printed in the United States of America

INTRODUCTION

The aim of (the) SN Distribution Study of Grocery Store Sales (1992) book is to collect information regarding food stores for the 330+ Metropolitan Statistical Areas and Primary Metropolitan Statistical Areas throughout the United States, as well as certain major metropolitan areas in Canada. Statistics presented cover information as recent as 1991 or as far back as 1989, depending on what information is available. Most figures represent 1990 activity.

The information includes Number of Stores, Percent of Market Share (where available) and Principal Supplier for the various chains, voluntary/co-op, independent and convenience stores within these market areas.

For the top 50 market areas (as based on area total supermarket sales volume-Section I), an in-depth analysis" is provided. The "analysis" includes total retail sales, total food store sales, total supermarket sales, demographics on population and households, comes from information kindly provided by The Survey of Buying Power, Demographics USA, 1991 (Sales & Marketing Management Magazine, New York, New York, Publisher). FURTHER REPRODUCTION IS FORBIDDEN.

When working with the SN book, please remember the following:

1. Market area surveys for which a source has been given, have been provided by that source.

2. Market areas which have no source name and do not contain the following footnote, "In-house estimates", were provided by a source who wishes to remain anonymous. For figures provided by an outside source, data may not be comparable from year to year due to differences in market area definitions or methods of compilation. These figures are estimated by the reporting source(s). In some instances, as will be indicated, percentages are not true market share, but are reflections of "place of most frequent purchase," as reported by consumers. FAIRCHILD BOOK DIVISION ASSUMES NO RESPONSIBILITY FOR THE ACCURACY OF THOSE FIGURES WHICH HAVE BEEN SUPPLIED BY OUTSIDE SOURCES.

3. Market areas which contain the following footnote, "In-house estimates", indicates that we have attempted to provide the number of stores, market share (where possible) and principal suppliers through the use of past information and current trends in the market area. If there are no visible changes compared to an earlier survey, we predict that NO CHANGES have occurred in the market.

4. The market areas covered (except for Canada) are based on the 1990 MSA List which is prepared by the Office of Management and Budget, as advised by the Federal Committee on MSA's.

5. Stores are listed based on their percent of market share, running highest to lowest. If market share is unobtainable, stores are listed in alphabetical order. (Alphabetical order does in no way reflect store standing in the market place.)

6. Please make note of the following term definitions:

Supermarket: A supermarket is any full-line, self-service grocery store with sales volume of $2 million or more annually.

Chain: A company which operates eleven or more stores in total. A chain store unit is a store operated by such a company.

Independent: A firm which operates from one to ten stores.

Cooperative: Independent grocers who jointly own and operate their own wholesale organization.

Voluntary: A group of independent grocery stores jointly sponsored by an independent wholesaler.

Convenience Store: A small store handling a limited variety of items in general use in most households and patronized for fill-in home requirements.

Metropolitan Statistical Area: Metropolitan Statistical Areas are defined according to a set of detailed standards prepared by the Federal Committee on MSA's. (The Federal Committee advises the OMB (Office of Management and Budget) on MSA matters.) Under these standards (as revised in 1980), an area qualifies for recognition as an MSA in one or two ways: if there is a city of at least 50,000 in population, or an urbanized area of at least 50,000 with a total metropolitan population of at least 100,000. MSAs are defined in terms of entire counties, except in the six New England States where they are defined in terms of cities and towns; Louisiana, where they are defined by parish; and in Alaska where they are defined by borough. In addition to the county containing the main city, an MSA also includes additional counties having strong economic and social ties to the central county. If an area has more than 1 million in population and meets certain other specified requirements, it is called a "Consolidated Metropolitan Statistical Area" (CMSA); if it consists of two or more major components it is recognized as a "Primary Metropolitan Statistical Area" (PMSA).

TABLE OF CONTENTS

SECTION 1: THE TOP 50 MARKET AREAS RANKED BY SUPERMARKET SALES VOLUME 1990:

Market Area	Rank by Supermarket Sales 1990	Page
Albany-Schenectady-Troy, NY	50th	100-101
Anaheim-Santa Ana, CA	13th	26-27
Atlanta, GA	11th	22-23
Austin, TX	48th	96-97
Baltimore, MD	20th	40-41
Bergen-Passaic, NJ	32nd	64-65
Boston-Lawrence-Salem-Lowell-Brockton, MA	6th	12-13
Buffalo, NY	49th	98-99
Charlotte-Gastonia-Rock Hill, NC-SC	45th	90-91
Chicago, IL	3rd	6-7
Cincinnati, OH	33rd	66-67
Cleveland, OH	26th	52-53
Columbus, OH	44th	88-89
Dallas, TX	10th	20-21
Denver, CO	24th	48-49
Detroit, MI	8th	16-17
Ft. Lauderdale-Hollywood, Pompano Beach, FL	37th	74-75
Ft. Worth-Arlington, TX	30th	60-61
Hartford-New Britain-Middletown-Bristol, CT	46th	92-93
Houston, TX	7th	14-15
Kansas City, MO-KS	27th	54-55
Los Angeles-Long Beach, CA	1st	2-3
Miami-Hialeah, FL	25th	50-51
Middlesex-Somerset-Hunterdon, NJ	42nd	84-85
Milwaukee, WI	38th	76-77
Minneapolis-St. Paul, MN-WI	14th	28-29
Monmouth-Ocean, NJ	39th	78-79
Nassau-Suffolk, NY	9th	18-19
New Orleans, LA	29th	58-59
New York, NY	2nd	4-5
Newark, NJ	22nd	44-45
Norfolk-Virginia Beach-Newport News, VA	35th	70-71
Oakland, CA	21st	42-43
Orlando,FL	43rd	86-87
Philadelphia, PA-NJ	4th	8-9
Phoenix, AR	12th	24-25
Pittsburgh, PA	23rd	46-47

(continued)

TABLE OF CONTENTS

SECTION 1: THE TOP 50 MARKET AREAS RANKED BY SUPERMARKET SALES VOLUME 1989: (continued)

Market Area	Rank by Supermarket Sales 1990	Page
Portland, OR	40th	80-81
Riverside-San Bernardino, CA	15th	30-31
Rochester, NY	41st	82-83
Sacramento, CA	31st	62-63
St. Louis, MO-IL	17th	34-35
Salt Lake City-Ogden, UT	47th	94-95
San Antonio, TX	34th	68-69
San Diego, CA	16th	36-37
San Francisco, CA	28th	56-57
San Jose, CA	36th	72-73
Seattle, WA	16th	32-33
Tampa-St. Petersburg-Clearwater, FL	19th	38-39
Washington, D.C.-MD-VA	5th	10-11

SECTION 2:

OTHER MARKETS: ARRANGED BY STATE AND CITY INCLUDING CANADA 103

SECTION 3:

PROFILES OF LEADING FOOD CHAINS 281

SECTION 4:

GROCERY STORE STATISTICAL PROFILE 299

Distribution of Food Store Sales by Geographic Region: 1989, 1990 300
Per Capita Sales of Food Stores by Geographic Region: 1989, 1990 301
Distribution of the U.S. Population, Effective Buying Income & Supermarket Sales, By Region & State: 1990 302

SECTION 5:

ADDITIONAL SUPERMARKET DATA 305

Calendar of Industry Events for 1992 306
Directory of Food Associations 312

Distribution Study of Grocery Store Sales

Fairchild Fashion & Merchandising Group
New York

SN'92

Section 1: The Top 50 Market Areas

Ranked by Supermarket Sales Volume

1. LOS ANGELES – LONG BEACH, CALIFORNIA – PMSA

Los Angeles County

	No. of Stores	% of Shopper Traffic*	Principal Supplier
LEADING STORES:		75.8%	
Vons	104	21.0	Own, El Monte, CA
Ralphs	74	17.9	Own, Compton, CA
Lucky	84	18.2	Own, Buena Park, CA
Alpha Beta	72	8.4	Own, LaHabra, CA
Hughes	28	5.3	Own, Glendale, CA (50%) and Certified Grocers of California, LA, CA (50%)
Albertson's	20	5.0	Cert. Grocers of California, L.A., CA
OTHER GROCERY STORES	na	24.2%	
TOTAL	382	100.0%	

na not available

* Based on the following question "Last week, at what store did your household buy the majority of your groceries?
Annual findings 1990.

Note: Above information kindly provided by THE LOS ANGELES TIMES.

Market Area Covered:
LOS ANGELES-LONG BEACH, CA

Rank in U.S. based on supermarket sales in 1990: 1

	U.S.	PMSA Total
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$67,142
Food Store Sales (mil.)	$362,667	$12,454
% of total retail sales	20.1%	18.5%
Supermarket Sales (mil.)	$340,455	$11,487
% of Food Store Sales	93.9%	92.2%
Supermarket Sales per capita	$1,357	$1,281
POPULATION 1990 TOTAL (thous.)	250,812	8,968
Total Number of Households (thous.)	92,735	3,026
Population by Age of Household Head		
Under 25 Years	5.5%	5.6%
25 - 34 Years	21.6%	24.4%
35 - 44 Years	22.2%	23.7%
45 - 54 Years	15.6%	16.2%
55 - 64 Years	13.5%	12.6%
65 and Over	21.7%	17.5%
Number of Persons per Household		
% by # of persons per household		
One	24.5%	25.0%
Two	32.0%	28.0%
Three	17.4%	15.9%
Four	15.1%	14.0%
Five	6.7%	7.9%
Six and Over	4.2%	9.4%
Average Household Size	2.7	2.96
INCOME 1990		
Net EBI (mil.)	3,499,365	138,244
Per Capita EBI	13,952	15,415
Median Household EBI	27,912	32,976
Household by EBI Groups		
% Distribution		
Under $10,000	16.2%	13.4%
$10,000 - $24,999	28.9%	25.0%
$25,000 and Over	55.0%	61.5%
Projected EBI % change 1990/95	35.6%	30.9%
Projected average household EBI % change 1990/95	29.2%	27.7%

2. NEW YORK, NEW YORK – PMSA

Bronx, Kings, New York, Putnam, Queens, Richmond, Rockland and Westchester Counties

	No. of Stores	% of Market Share	Principal Supplier
LEADING CHAINS:		69.0%	
Waldbaum's	54	16.0	Own, Central Islip, NY
Pathmark	23	11.0	Supermarkets General Corp., Woodbridge, NJ
A&P	71	10.0	Own, Montvale, NJ
Grand Union	31	5.0	Own, Elmwood Park, NJ
Red Apple/Gristedes	53	5.0	White Rose, New York, NY
Food Emporium	20	4.0	A&P, Bronx, NY
Key Food	21	3.0	Own, Brooklyn, NY
Shop Rite	8	3.0	Wakefern, Elizabeth, NY
Sloan's	34	3.0	Krasdale, New York, NY
C-Town	23	2.0	Krasdale, Bronx, NY
D'Agostino's	21	2.0	Twin County Grocers, Inc. New Rochelle, NY
Dan's	18	2.0	White Rose, Hempstead, NY
King Kullen	9	2.0	Own, Westbury, NY
Scaturro	8	1.0	White Rose, Floral Park, NY
OTHER GROCERY STORES	na	31.0%	
TOTAL	394	100.0%	

na not available

* According to our sources, New York has experienced no changes since last year.

Market Area Covered:
NEW YORK, NY

Rank in U.S. based on supermarket sales in 1990: 2

	U.S.	PMSA Total	Central City New York City*
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$49,319	$38,926
Food Store Sales (mil.)	$362,667	$9,858	$7,879
% of total retail sales	20.1%	20.0%	20.2%
Supermarket Sales (mil.)	$340,455	$8,216	$6,400
% of Food Store Sales	93.9%	83.3%	81.2%
Supermarket Sales per capita	$1,357	$956	$869
POPULATION 1990 TOTAL (thous.)	250,812	8,592	7,365
Total Number of Households (thous.)	92,735	3,271	2,837
Population by Age of Household Head			
Under 25 Years	5.5%	3.8%	3.9%
25 - 34 Years	21.6%	20.7%	21.1%
35 - 44 Years	22.2%	22.2%	22.1%
45 - 54 Years	15.6%	16.8%	16.5%
55 - 64 Years	13.5%	14.3%	14.0%
65 and Over	21.7%	22.3%	22.2%
Number of Persons per Household			
% by # of persons per household			
One	24.5%	31.6%	32.9%
Two	32.0%	27.5%	27.1%
Three	17.4%	16.1%	15.7%
Four	15.1%	12.8%	12.2%
Five	6.7%	6.5%	6.3%
Six and Over	4.2%	5.6%	5.7%
Average Household Size	2.7	2.63	2.66
INCOME 1990			
Net EBI (mil.)	3,499,365	137,188	109,701
Per Capita EBI	13,952	15,967	14,894
Median Household EBI	27,912	27,895	34,729
Household by EBI Groups			
% Distribution			
Under $10,000	16.2%	28.6%	20.1%
$10,000 - $24,999	28.9%	27.1%	28.7%
$25,000 and Over	55.0%	54.4%	53.3%
Projected EBI % change 1990/95	35.6%	28.0%	27.3%
Projected average household EBI			
% change 1990/95	29.2%	26.6%	25.6%

* Includes Bronx, Kings, New York, Queens, and Richmond Counties

3. CHICAGO, ILLINOIS – PMSA

Cook, DuPage and McHenry Counties

	No. of Stores	% of Market Share	Principal Supplier
LEADING CHAINS:		98.0%	
Jewel	148	46.0	Own, Melrose Park, IL
Dominick's	88	23.0	Own, Northlake, IL
Certified Grocers Midwest, Inc.	123	12.0	Own, Chicago, IL
Central Grocers (C)	45	5.0	Own, Franklin Park, IL
Cub	7	4.0	J.M. Jones Company, Champaign, IL
Eagle	16	3.0	Own, Rock Island, IL
Omni	5	3.0	Dominick's, Northlake, IL
Aldi	19	2.0	Own, Batavia, IL
OTHER GROCERY STORES	na	2.0%	
TOTAL	451	100.0%	

na not available
(C) Cooperative Group
Note: Above information kindly provided by LERNER NEWSPAPERS and another source which prefers to be anonymous.

Market Area Covered:
CHICAGO, IL

Rank in U.S. based on supermarket sales in 1990: 3

	U.S.	PMSA Total
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$47,561
Food Store Sales (mil.)	$362,667	$7,938
% of total retail sales	20.1%	16.7%
Supermarket Sales (mil.)	$340,455	$7,247
% of Food Store Sales	93.9%	91.3%
Supermarket Sales per capita	$1,357	$1,192
POPULATION 1990 TOTAL (thous.)	250,812	6,077
Total Number of Households (thous.)	92,735	2,224
Population by Age of Household Head		
Under 25 Years	5.5%	4.5%
25 - 34 Years	21.6%	22.8%
35 - 44 Years	22.2%	22.3%
45 - 54 Years	15.6%	16.0%
55 - 64 Years	13.5%	13.8%
65 and Over	21.7%	20.5%
Number of Persons per Household		
% by # of persons per household		
One	24.5%	26.9%
Two	32.0%	28.8%
Three	17.4%	16.6%
Four	15.1%	14.5%
Five	6.7%	7.5%
Six and Over	4.2%	5.8%
Average Household Size	2.7	2.73
INCOME 1990		
Net EBI (mil.)	3,499,365	97,912
Per Capita EBI	13,952	16,111
Median Household EBI	27,912	33,927
Household by EBI Groups		
% Distribution		
Under $10,000	16.2%	14.3%
$10,000 - $24,999	28.9%	22.9%
$25,000 and Over	55.0%	62.8%
Projected EBI % change 1990/95	35.6%	3320.0%
Projected average household EBI % change 1990/95	29.2%	32.6%

4. PHILADELPHIA, PENNSYLVANIA-NEW JERSEY - PMSA

Bucks, Chester, Delaware, Montgomery and Philadelphia Counties-PA
Burlington, Camden and Glouchester Counties-NJ

	No. of Stores*	% of Market Share*	Principal Supplier
LEADING CHAINS:		94.0%	
Acme	104	38.0	American Stores Co., Forty Fort and Philadelphia, PA
Pathmark	23	11.0	Supermarkets General Corp., Delran, NJ
Super Fresh	48	10.0	A&P, Florence, NJ
Thriftway	44	7.0	na
Genuardi Supermarkets	27	7.0	Own, Norristown, PA
Shop-Rite (V)	17	7.0	Wakefern Foods, Elizabeth, NJ
Shop 'n Bag	35	5.0	na
IGA	24	4.0	na
Clemens Markets	12	3.0	na
Giant Food Stores	7	2.0	na
OTHER GROCERY STORES	na	6.0%	
TOTAL	341	100.0%	

na not available
(V) Voluntary
Note: Above information kindly provided by the PHILADELPHIA ENQUIRER & NEWS.

Market Area Covered:
PHILADELPHIA, PA

Rank in U.S. based on supermarket sales in 1990: 4

	U.S.	MSA Total	Central City Philadelphia
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$36,033	$7,741
Food Store Sales (mil.)	$362,667	$7,596	$1,874
% of total retail sales	20.1%	21.1%	24.2%
Supermarket Sales (mil.)	$340,455	$6,886	$1,625
% of Food Store Sales	93.9%	90.7%	86.7%
Supermarket Sales per capita	$1,357	$1,409	$1,025
POPULATION 1990 TOTAL (thous.)	250,812	4,887	1,585
Total Number of Households (thous.)	92,735	1,788	603
Population by Age of Household Head			
Under 25 Years	5.5%	4.0%	5.3%
25 - 34 Years	21.6%	20.5%	19.9%
35 - 44 Years	22.2%	21.8%	19.4%
45 - 54 Years	15.6%	15.8%	14.3%
55 - 64 Years	13.5%	14.7%	14.4%
65 and Over	21.7%	23.2%	26.5%
Number of Persons per Household			
% by # of persons per household			
One	24.5%	25.3%	31.5%
Two	32.0%	29.9%	27.7%
Three	17.4%	17.5%	16.1%
Four	15.1%	15.4%	12.4%
Five	6.7%	7.4%	6.6%
Six and Over	4.2%	4.5%	5.5%
Average Household Size	2.7	2.73	2.63
INCOME 1990			
Net EBI (mil.)	3,499,365	78,042	20,912
Per Capita EBI	13,952	15,970	13,195
Median Household EBI	27,912	33,277	24,880
Household by EBI Groups			
% Distribution			
Under $10,000	16.2%	13.4%	21.2%
$10,000 - $24,999	28.9%	24.2%	29.0%
$25,000 and Over	55.0%	62.5%	49.8%
Projected EBI % change 1990/95	35.6%	37.7%	36.0%
Projected average household EBI			
% change 1990/95	29.2%	32.1%	35.8%

5. WASHINGTON, DISTRICT OF COLUMBIA–MARYLAND–VIRGINIA – MSA

District of Columbia; Charles, Montgomery, Prince George's–MD;
Arlington, Fairfax, Loudoun, Prince William and Stafford Counties–VA
Alexandria, Fairfax, Falls Church, Manassas and Manassas Park Cities–VA

	No. of Stores	% of Market Share	Principal Supplier
LEADING CHAINS:		93.4%	
Giant Food	107	45.8	Own, Jessus & Landover, MD
Safeway	105	30.0	Own, Landover, MD
Shoppers Food Warehouse	22	10.3	B. Green
Basics/Food-A-Rama	13	3.7	Super-Rite Foods
Super Fresh	20	3.6	Direct, Warehouse in Richmond, VA
LEADING INDEPENDENTS:		5.6%	
Magruder's	12	3.0	Own, also from Wetterau and Richfood, Inc, VA
Weis Markets	8	0.9	Sunbury, PA
Fresh Value	5	0.7	Richfood, Richmond, VA
Food Lion	3	0.6	na
Dayton/Mitchell Thriftways	4	0.4	Fleming, Oaks, PA
TOTAL	297	100.0%	

Source: 1991 Food World

Market Area Covered:
WASHINGTON, DC

Rank in U.S. based on supermarket sales in 1990: 5

	U.S.	PMSA Total	Central City Washington, DC
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$32,926	$28,420
Food Store Sales (mil.)	$362,667	$6,102	$5,242
% of total retail sales	20.1%	18.5%	18.4%
Supermarket Sales (mil.)	$340,455	$5,822	$4,996
% of Food Store Sales	93.9%	95.4%	95.3%
Supermarket Sales per capita	$1,357	$1,460	$8,269
POPULATION 1990 TOTAL (thous.)	250,812	3,988	604
Total Number of Households (thous.)	92,735	1,483	248
Population by Age of Household Head			
Under 25 Years	5.5%	4.9%	6.0%
25 - 34 Years	21.6%	24.6%	22.5%
35 - 44 Years	22.2%	26.0%	21.7%
45 - 54 Years	15.6%	18.2%	15.7%
55 - 64 Years	13.5%	12.1%	13.3%
65 and Over	21.7%	14.2%	20.9%
Number of Persons per Household			
% by # of persons per household			
One	24.5%	25.2%	41.5%
Two	32.0%	30.7%	27.0%
Three	17.4%	18.3%	13.3%
Four	15.1%	15.2%	8.9%
Five	6.7%	6.5%	4.4%
Six and Over	4.2%	4.0%	4.4%
Average Household Size	2.7	2.69	2.43
INCOME 1990			
Net EBI (mil.)	3,499,365	79,219	10,666
Per Capita EBI	13,952	19,862	17,653
Median Household EBI	27,912	42,929	26,962
Household by EBI Groups			
% Distribution			
Under $10,000	16.2%	7.8%	17.7%
$10,000 - $24,999	28.9%	18.3%	29.0%
$25,000 and Over	55.0%	74.0%	53.1%
Projected EBI % change 1990/95	35.6%	39.1%	26.6%
Projected average household EBI			
% change 1990/95	29.2%	28.5%	29.4%

6. BOSTON, MASSACHUSETTS – PMSA

Parts of: Bristol, Essex, Middlesex, Norfolk, Plymouth, Suffolk and Worcester Counties

	No. of Stores*	% of Market Share*	Principal Supplier
LEADING STORES:		81.0%	
Purity Supreme	62	14.0	Own, North Billerica, MA
Shaw's	39	13.0	Own, East Bridgewater, MA
DeMoulas/Market Basket	44	12.0	Own, Tewksbury, MA
Stop & Shop	47	11.0	Own, North Quincy, MA
Sweet Life Foods	59	10.0	Own, Northborough, MA
Star Market	45	10.0	Own, Cambridge, MA
Almacs	4	1.0	Own, East Province, RI
OTHER GROCERY STORES	na	29.0%	
TOTAL	236	100.0%	

na not available
* In-house estimates.

Market Area Covered:
BOSTON, MA

Rank in U.S. based on supermarket sales in 1990: 6

	U.S.	PMSA Total
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$32,454
Food Store Sales (mil.)	$362,667	$6,408
% of total retail sales	20.1%	19.7%
Supermarket Sales (mil.)	$340,455	$5,703
% of Food Store Sales	93.9%	89.0%
Supermarket Sales per capita	$1,357	$1,504
POPULATION 1990 TOTAL (thous.)	250,812	3,791
Total Number of Households (thous.)	92,735	1,415
Population by Age of Household Head		
Under 25 Years	5.5%	4.8%
25 - 34 Years	21.6%	22.1%
35 - 44 Years	22.2%	22.3%
45 - 54 Years	15.6%	15.5%
55 - 64 Years	13.5%	13.4%
65 and Over	21.7%	21.8%
Number of Persons per Household		
% by # of persons per household		
One	24.5%	26.4%
Two	32.0%	30.6%
Three	17.4%	17.3%
Four	15.1%	15.1%
Five	6.7%	6.9%
Six and Over	4.2%	3.7%
Average Household Size	2.7	2.68
INCOME 1990		
Net EBI (mil.)	3,499,365	68,268
Per Capita EBI	13,952	18,006
Median Household EBI	27,912	36,445
Household by EBI Groups		
% Distribution		
Under $10,000	16.2%	11.7%
$10,000 - $24,999	28.9%	22.4%
$25,000 and Over	55.0%	65.9%
Projected EBI % change 1990/95	35.6%	29.9%
Projected average household EBI		
% change 1990/95	29.2%	28.8%

7. HOUSTON, TEXAS - PMSA

Fort Bend, Harris, Liberty, Montgomery and Waller Counties

	No. of Stores	% of Market Share*	Principal Supplier
LEADING CHAINS:			
Kroger	56	49.0	Own, Houston, TX
Randalls	36	44.0	Fleming Foods, Houston, TX
Appletree	46	32.0	Own, Houston, TX
Fiesta	19	27.0	Own, Houston, TX
Gerlands	24	13.0	Fleming & Grocer Supply, Houston, TX
Rice	26	11.0	Grocer Supply, Houston, TX
Food City	6	6.0	Schepps Wholesale, Houston, TX
Food 4 Less	2	3.0	Fleming Foods, Houston, TX
Minimax	4	3.0	Fleming Foods, Houston, TX
Lucky 7	20	2.0	Grocer Supply, Houston, TX
Lewis & Coker	1	1.0	Grocer Supply, Houston, TX
Jumbo	2	1.0	Fleming Foods, Houston, TX
Auchan	1	6.0	na
Sams	6	17.0	na
LEADING CONVENIENCE STORES:			
Stop n Go	382	23.0	na
Circle K	259	13.0	Grocers Supply, Houston, TX
OTHER GROCERY STORES	na	21.0%	na
TOTAL	890		

na not available

* Based on percent of households shopping each store in "past week". Due to multiple answers, percents do not equal 100.0%.

Note: Above information kindly provided by THE HOUSTON CHRONICLE.

Market Area Covered:
HOUSTON, TX

Rank in U.S. based on supermarket sales in 1990: 7

	U.S.	PMSA Total
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$24,203
Food Store Sales (mil.)	$362,667	$5,389
% of total retail sales	20.1%	22.3%
Supermarket Sales (mil.)	$340,455	$5,148
% of Food Store Sales	93.9%	95.5%
Supermarket Sales per capita	$1,357	$1,545
POPULATION 1990 TOTAL (thous.)	250,812	3,331
Total Number of Households (thous.)	92,735	1,197
Population by Age of Household Head		
Under 25 Years	5.5%	6.4%
25 - 34 Years	21.6%	27.2%
35 - 44 Years	22.2%	26.3%
45 - 54 Years	15.6%	16.2%
55 - 64 Years	13.5%	11.3%
65 and Over	21.7%	12.5%
Number of Persons per Household		
% by # of persons per household		
One	24.5%	24.9%
Two	32.0%	28.1%
Three	17.4%	17.6%
Four	15.1%	16.0%
Five	6.7%	7.6%
Six and Over	4.2%	5.7%
Average Household Size	2.7	2.78
INCOME 1990		
Net EBI (mil.)	3,499,365	46,419
Per Capita EBI	13,952	13,935
Median Household EBI	27,912	30,278
Household by EBI Groups		
% Distribution		
Under $10,000	16.2%	13.7%
$10,000 - $24,999	28.9%	27.0%
$25,000 and Over	55.0%	59.2%
Projected EBI % change 1990/95	35.6%	31.4%
Projected average household EBI		
.% change 1990/95	29.2%	25.4%

8. DETROIT, MICHIGAN – PMSA

Lapeer, Livingston, Macomb, Monroe, Oakland, St. Clair and Wayne Counties

	No. of Stores*	% of Market Share*	Principal Supplier
LEADING CHAINS:		75.0%	
Kroger	68	21.0	Foodland Dist., Southfield, MI
Farmer Jack	67	20.0	Bormans/Certified Wholesale, Detroit, MI
Spartan	77	12.0	Own, Grand Rapids, MI
A&P	44	11.0	Own, Southfield, MI
Great Scott	32	9.0	Abner A. Wolf, Detroit, MI
Meijer	17	8.0	Own, Grand Rapids, MI
OTHER GROCERY STORES	na	25.0%	
TOTAL	273	100.0%	

na not available
* In-house estimates.

Market Area Covered:
DETROIT, MI

Rank in U.S. based on supermarket sales in 1990: 8

	U.S.	PMSA Total
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$33,350
Food Store Sales (mil.)	$362,667	$5,297
% of total retail sales	20.1%	15.9%
Supermarket Sales (mil.)	$340,455	$4,710
% of Food Store Sales	93.9%	88.9%
Supermarket Sales per capita	$1,357	$1,073
POPULATION 1990 TOTAL (thous.)	250,812	4,388
Total Number of Households (thous.)	92,735	1,621
Population by Age of Household Head		
Under 25 Years	5.5%	4.3%
25 - 34 Years	21.6%	21.3%
35 - 44 Years	22.2%	23.0%
45 - 54 Years	15.6%	16.3%
55 - 64 Years	13.5%	14.1%
65 and Over	21.7%	20.9%
Number of Persons per Household		
% by # of persons per household		
One	24.5%	24.3%
Two	32.0%	30.2%
Three	17.4%	18.0%
Four	15.1%	15.9%
Five	6.7%	7.3%
Six and Over	4.2%	4.3%
Average Household Size	2.7	2.71
INCOME 1990		
Net EBI (mil.)	3,499,365	64,078
Per Capita EBI	13,952	14,603
Median Household EBI	27,912	31,089
Household by EBI Groups		
% Distribution		
Under $10,000	16.2%	15.4%
$10,000 - $24,999	28.9%	24.5%
$25,000 and Over	55.0%	60.1%
Projected EBI % change 1990/95	35.6%	32.0%
Projected average household EBI		
% change 1990/95	29.2%	30.0%

9. NASSAU-SUFFOLK, NEW YORK - PMSA

Nassau and Suffolk Counties

	No. of Stores	% of Market Share	Principal Supplier
LEADING CHAINS:		86.2%	
Waldbaum's	44	27.4	Own, Central Islip, NY
Pathmark	25	19.1	Supermarkets General Corp., Huntington Station, NY
King Kullen	47	17.0	Own, Westbury, NY
Food Town	14	6.8	Twin County Grocer, East Rockaway, NY
A&P	23	5.9	Own, Rockwell Center, NY
Finast	10	4.0	First National, Oyster Bay, NY
Grand Union	11	3.8	Own, Elmwood Park, NJ
Shop Rite	4	2.4	Wakefern, Freehold, NJ
OTHER GROCERY STORES	59	13.9%	
TOTAL	237	100.0%	

na not available

Note: Above information kindly provided by NEW YORK NEWSDAY/LONG ISLAND NEWSDAY.

Market Area Covered:
NASSAU, NY

Rank in U.S. based on supermarket sales in 1990: 9

	U.S.	PMSA Total	Central County Nassau	Central County Suffolk
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$26,053	$14,420	$11,632
Food Store Sales (mil.)	$362,667	$5,159	$2,488	$2,671
% of total retail sales	20.1%	19.8%	17.3%	23.0%
Supermarket Sales (mil.)	$340,455	$4,590	$2,204	$2,386
% of Food Store Sales	93.9%	89.0%	88.6%	89.3%
Supermarket Sales per capita	$1,357	$1,754	$1,714	$17,859
POPULATION 1990 TOTAL (thous.)	250,812	2,616	1,286	134
Total Number of Households (thous.)	92,735	859	431	428
Population by Age of Household Head				
Under 25 Years	5.5%	1.0%	1.6%	2.1%
25 - 34 Years	21.6%	16.8%	14.6%	18.9%
35 - 44 Years	22.2%	23.1%	21.8%	24.3%
45 - 54 Years	15.6%	19.1%	18.1%	20.1%
55 - 64 Years	13.5%	17.5%	18.8%	16.1%
65 and Over	21.7%	21.8%	24.8%	18.7%
Number of Persons per Household				
% by # of persons per household				
One	24.5%	16.5%	17.2%	15.9%
Two	32.0%	28.9%	29.9%	27.8%
Three	17.4%	19.5%	19.3%	19.4%
Four	15.1%	19.6%	19.0%	20.1%
Five	6.7%	9.7%	9.1%	10.1%
Six and Over	4.2%	6.1%	5.6%	6.5%
Average Household Size	2.7	3.05	2.99	3.11
INCOME 1990				
Net EBI (mil.)	3,499,365	53,773	29,085	24,688
Per Capita EBI	13,952	20,554	22,624	184,790
Median Household EBI	27,912	49,494	53,505	46,216
Household by EBI Groups				
% Distribution				
Under $10,000	16.2%	6.2%	7.9%	6.3%
$10,000 - $24,999	28.9%	14.9%	13.5%	16.6%
$25,000 and Over	55.0%	78.9%	81.0%	77.2%
Projected EBI % change 1990/95	35.6%	30.8%	28.9%	33.0%
Projected average household EBI				
% change 1990/95	29.2%	30.0%	30.1%	30.3%

10. DALLAS, TEXAS – PMSA

Collin, Dallas, Denton, Ellis, Kaufman and Rockwall Counties

	No. of Stores	% of Market Share	Principal Supplier
LEADING CHAINS:		67.0%	
Tom Thumb	41	22.9	A.W. Cullum & Co., Dallas, TX
Kroger	26	21.9	Own, Irving, TX
Skaggs Alpha Beta	16	14.0	Fleming, Fort Worth, TX
Minyard's Food Stores	42	10.1	Big Tex, Dallas, TX
Albertson's	12	7.1	Fleming, Forth Worth, TX
Sack N Save	na	4.3	Big Tex, Dallas, TX
Brookshires	na	4.0	na
Winn Dixie	10	2.7	Own, Fort Worth, TX
VOLUNTARY &/OR COOP GROUPS:		2.3%	
Affiliated, AG, Thriftee	220	2.3	Affiliated, Dallas, TX
LEADING INDEPENDENTS:		1.6%	
Hypermart USA	1	1.2	na
Jewel T's Box Stores	13	0.4	na
OTHER GROCERY STORES	na	9.1%	
TOTAL	390	100.0%	

na not available

Note: Information above kindly provided by THE DALLAS TIMES HERALD.

Market Area Covered:
DALLAS, TX

Rank in U.S. based on supermarket sales in 1990: 10

	U.S.	PMSA Total	Central City Dallas
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$23,294	$18,435
Food Store Sales (mil.)	$362,667	$2,494	$3,222
% of total retail sales	20.1%	10.7%	17.5%
Supermarket Sales (mil.)	$340,455	$4,157	$3,108
% of Food Store Sales	93.9%	166.7%	96.5%
Supermarket Sales per capita	$1,357	$1,597	$1,655
POPULATION 1990 TOTAL (thous.)	250,812	2,603	1,877
Total Number of Households (thous.)	92,735	974	711
Population by Age of Household Head			
Under 25 Years	5.5%	7.2%	7.2%
25 - 34 Years	21.6%	28.9%	28.8%
35 - 44 Years	22.2%	24.4%	23.6%
45 - 54 Years	15.6%	15.7%	15.2%
55 - 64 Years	13.5%	10.6%	11.1%
65 and Over	21.7%	13.1%	13.9%
Number of Persons per Household			
% by # of persons per household			
One	24.5%	26.1%	27.8%
Two	32.0%	30.0%	29.8%
Three	17.4%	17.6%	17.0%
Four	15.1%	15.2%	14.1%
Five	6.7%	6.6%	6.5%
Six and Over	4.2%	4.5%	4.9%
Average Household Size	2.7	2.67	2.64
INCOME 1990			
Net EBI (mil.)	3,499,365	39,928	28,167
Per Capita EBI	13,952	15,340	15,003
Median Household EBI	27,912	31,057	29,319
Household by EBI Groups			
% Distribution			
Under $10,000	16.2%	13.1%	13.5%
$10,000 - $24,999	28.9%	27.0%	29.1%
$25,000 and Over	55.0%	59.7%	57.4%
Projected EBI % change 1990/95	35.6%	51.3%	44.0%
Projected average household EBI			
% change 1990/95	29.2%	37.3%	34.2%

11. ATLANTA, GEORGIA – MSA

Barrow, Butts, Cherokee, Clayton, Cobb, Coweta, DeKalb, Douglas, Fayette, Forsyth, Fulton, Gwinnett, Henry, Newton, Paulding, Rockdale, Spalding and Walton Counties

	No. of Stores	% of Market Share	Principal Supplier
LEADING STORES:		98.5%	
Kroger	70	33.0	Own, Atlanta, GA
Winn Dixie	61	19.2	Own, Atlanta, GA
Super Valu Stores, Inc.	60	16.0	Own, Atlanta, GA
Big Star	46	16.4	Grand Union, East Point, GA
A&P	25	12.4	Own, Atlanta, GA
Cub Foods	8		na
Bruno's	7	1.0	Brunos, Birmingham, AL
Piggly Wiggly	4	0.5	Own, Vidalia, GA
OTHER GROCERY STORES	na	1.5%	
TOTAL	281	100.0%	

na not available

Note: Above information kindly provided by THE ATLANTA JOURNAL-CONSTITUTION.

Source: The Shelby Report.

Market Area Covered:
ATLANTA, GA

Rank in U.S. based on supermarket sales in 1990: 11

	U.S.	MSA Total
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$24,168
Food Store Sales (mil.)	$362,667	$4,003
% of total retail sales	20.1%	16.6%
Supermarket Sales (mil.)	$340,455	$3,856
% of Food Store Sales	93.9%	96.3%
Supermarket Sales per capita	$1,357	$985
POPULATION 1990 TOTAL (thous.)	250,812	3,915
Total Number of Households (thous.)	92,735	1,087
Population by Age of Household Head		
Under 25 Years	5.5%	6.1%
25 - 34 Years	21.6%	26.5%
35 - 44 Years	22.2%	26.2%
45 - 54 Years	15.6%	16.8%
55 - 64 Years	13.5%	11.0%
65 and Over	21.7%	13.3%
Number of Persons per Household		
% by # of persons per household		
One	24.5%	22.9%
Two	32.0%	31.7%
Three	17.4%	19.4%
Four	15.1%	16.3%
Five	6.7%	6.3%
Six and Over	4.2%	3.4%
Average Household Size	2.7	2.68
INCOME 1990		
Net EBI (mil.)	3,499,365	44,471
Per Capita EBI	13,952	11,360
Median Household EBI	27,912	32,838
Household by EBI Groups		
% Distribution		
Under $10,000	16.2%	12.9%
$10,000 - $24,999	28.9%	24.6%
$25,000 and Over	55.0%	62.5%
Projected EBI % change 1990/95	35.6%	46.6%
Projected average household EBI		
% change 1990/95	29.2%	28.1%

12. PHOENIX, ARIZONA – MSA

Maricopa County

	No. of Stores	% of Market Share*	Principal Supplier
LEADING STORES:			
ABCO	54		Abco, Phoenix, AZ
Albertson's	9		Own, Salt Lake City, UT
Bashas'	30		Own, Chandler, AZ
Fry's	32		Kroger, Phoenix, AZ
IGA Stores	12		Fleming, Phoenix, AZ
Mega Foods	10		na
Safeway	36		Own, Phoenix, AZ
Smith's Food & Drug	7		Own, Layton, UT
Smitty's	24		Fleming, Phoenix, AZ
OTHER GROCERY STORES	na		
TOTAL	214		

na not available
* Share of Market Data is unobtainable.

Market Area Covered:
PHOENIX, AR

Rank in U.S. based on supermarket sales in 1990: 12

	U.S.	MSA Total
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$16,652
Food Store Sales (mil.)	$362,667	$3,700
% of total retail sales	20.1%	22.2%
Supermarket Sales (mil.)	$340,455	$3,581
% of Food Store Sales	93.9%	96.8%
Supermarket Sales per capita	$1,357	$1,650
POPULATION 1990 TOTAL (thous.)	250,812	2,170
Total Number of Households (thous.)	92,735	826
Population by Age of Household Head		
Under 25 Years	5.5%	7.1%
25 - 34 Years	21.6%	24.0%
35 - 44 Years	22.2%	21.8%
45 - 54 Years	15.6%	14.6%
55 - 64 Years	13.5%	11.7%
65 and Over	21.7%	20.7%
Number of Persons per Household		
% by # of persons per household		
One	24.5%	25.1%
Two	32.0%	34.7%
Three	17.4%	15.9%
Four	15.1%	13.4%
Five	6.7%	6.3%
Six and Over	4.2%	4.6%
Average Household Size	2.7	2.63
INCOME 1990		
Net EBI (mil.)	3,499,365	30,178
Per Capita EBI	13,952	13,909
Median Household EBI	27,912	28,778
Household by EBI Groups		
% Distribution		
Under $10,000	16.2%	13.4%
$10,000 - $24,999	28.9%	29.8%
$25,000 and Over	55.0%	56.7%
Projected EBI % change 1990/95	35.6%	50.6%
Projected average household EBI % change 1990/95	29.2%	31.6%

13. ANAHEIM-SANTA ANA, CALIFORNIA - PMSA

Orange County

	No. of Stores	% of Market Share	Principal Supplier
LEADING STORES:		93.4%	
Lucky	39	21.1	Own, Buena Park, CA
Ralph's	34	19.2	Own, Compton, CA
Vons	28	17.0	Own, El Monte, CA
Alpha Beta	34	12.4	Own, LaHabra, CA
Albertson's	25	11.0	Own, Brea, CA
Hughes	10	5.1	Certified Grocers, LA, CA
Stater Bros.	15	4.7	Own, Colton, CA
Pavilions/Pavilions Place	9	2.9	na
OTHER GROCERY STORES	na	6.6%	
TOTAL	194	100.0%	

na not available
Note: Above information kindly provided by THE ORANGE COUNTY REGISTER.

Market Area Covered:
ANAHEIM-SANTA ANA, CA

Rank in U.S. based on supermarket sales in 1990: 13

	U.S.	PMSA Total
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$22,167
Food Store Sales (mil.)	$362,667	$3,760
% of total retail sales	20.1%	17.0%
Supermarket Sales (mil.)	$340,455	$3,498
% of Food Store Sales	93.9%	93.0%
Supermarket Sales per capita	$1,357	$1,427
POPULATION 1990 TOTAL (thous.)	250,812	2,451
Total Number of Households (thous.)	92,735	841
Population by Age of Household Head		
Under 25 Years	5.5%	5.3%
25 - 34 Years	21.6%	24.1%
35 - 44 Years	22.2%	24.0%
45 - 54 Years	15.6%	17.6%
55 - 64 Years	13.5%	12.7%
65 and Over	21.7%	16.2%
Number of Persons per Household		
% by # of persons per household		
One	24.5%	20.7%
Two	32.0%	32.2%
Three	17.4%	17.5%
Four	15.1%	15.2%
Five	6.7%	7.0%
Six and Over	4.2%	7.4%
Average Household Size	2.7	2.91
INCOME 1990		
Net EBI (mil.)	3,499,365	43,951
Per Capita EBI	13,952	17,931
Median Household EBI	27,912	41,179
Household by EBI Groups		
% Distribution		
Under $10,000	16.2%	7.8%
$10,000 - $24,999	28.9%	20.0%
$25,000 and Over	55.0%	72.3%
Projected EBI % change 1990/95	35.6%	34.7%
Projected average household EBI % change 1990/95	29.2%	13.3%

14. MINNEAPOLIS–ST. PAUL, MINNESOTA–WISCONSIN – MSA

Anoka, Carver, Chisago, Dakota, Hennepin, Isanti, Ramsey, Scott, Washington and Wright Counties – MN
St. Croix Counties – WI

	No. of Stores	% of Market Share	Principal Supplier
LEADING STORES:			
Rainbow Foods	23	29.2	Gateway, Minneapolis, MN
Cub Foods	12	24.5	Super Valu, Eden Prairie, MN
Super Valu/Food Stores	26	7.2	Super Valu, Eden Prairie, MN
Country Club	32	5.7	Fairway Foods, St. Louis Park, MN
Holiday Plus	4	5.6	Fairway, Northfield, MN
Byerly's	6	3.9	Super Valu, Eden Prairie, MN
New Market	16	3.8	Super Valu, Eden Prairie, MN
IGA Food Stores	6	3.5	Gateway, Minneapolis, MN
Kowalski's	3	2.5	Super Valu, Eden Prairie, MN
Country Stores	4	2.3	Super Valu, Eden Prairie, MN
Lunds	9	1.5	Nash Finch Co., Minneapolis, MN
Knowlen's Supermarkets	6	1.1	Gateway, Minneapolis, MN
SuperAmerica	180	0.8	Various
Fairway Foods	1	0.3	Fairway Foods Inc., Minneapolis, MN
Holiday Station Stores	59	0.3	Various
PDQ Stores	20	0.3	Winter-Weisman, Plymouth, MN
Wholesale Club (Renamed Sam's)	1	0.3	Walmart
Tom Thumb	102	0.2	Gateway, Blooming Prairie, MN Winter-Weisman, Plymouth, MN
OTHER GROCERY STORES	na	7.0%	
TOTAL	512	100.0%	

Note: Above information kindly provided by the MINNEAPOLIS STAR TRIBUNE and the ST. PAUL PIONEER PRESS.

Source: Scarborough Associates, 1991

Market Area Covered:
MINNEAPOLIS-ST PAUL, MN

Rank in U.S. based on supermarket sales in 1990: 14

	U.S.	MSA Total
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$20,447
Food Store Sales (mil.)	$362,667	$3,565
% of total retail sales	20.1%	17.4%
Supermarket Sales (mil.)	$340,455	$3,374
% of Food Store Sales	93.9%	94.6%
Supermarket Sales per capita	$1,357	$1,349
POPULATION 1990 TOTAL (thous.)	250,812	2,501
Total Number of Households (thous.)	92,735	950
Population by Age of Household Head		
Under 25 Years	5.5%	5.9%
25 - 34 Years	21.6%	26.5%
35 - 44 Years	22.2%	24.4%
45 - 54 Years	15.6%	15.3%
55 - 64 Years	13.5%	11.2%
65 and Over	21.7%	16.6%
Number of Persons per Household		
% by # of persons per household		
One	24.5%	25.0%
Two	32.0%	32.2%
Three	17.4%	17.1%
Four	15.1%	15.9%
Five	6.7%	6.7%
Six and Over	4.2%	3.1%
Average Household Size	2.7	2.63
INCOME 1990		
Net EBI (mil.)	3,499,365	40,156
Per Capita EBI	13,952	16,053
Median Household EBI	27,912	33,773
Household by EBI Groups		
% Distribution		
Under $10,000	16.2%	11.2%
$10,000 - $24,999	28.9%	24.5%
$25,000 and Over	55.0%	64.2%
Projected EBI % change 1990/95	35.6%	43.6%
Projected average household EBI % change 1990/95	29.2%	31.6%

15. RIVERSIDE-SAN BERNARDINO, CALIFORNIA - PMSA

Riverside and San Bernardino Counties

RIVERSIDE

	No. of Stores	% of Market Share*	Principal Supplier
LEADING STORES:			
Albertson's	10		Own, Brea, CA
Alpha Beta	12		Own, La Habra, CA
Base Commissary	1		Buy Direct
Food-4-Less	3		
Hughes	4		na
Jensens	1		na
Lucky	12		Own, Buena Park, CA
Ralphs	6		Own, Compton, CA
Smart & Final	7		
Stater Bros.	34		Own, Colton, CA
Vons	20		Own, Los Angeles, CA
OTHER GROCERY STORES	na		
TOTAL	111		

na not available * Share of Market Data is unobtainable.
Note: Above information kindly provided by THE RIVERSIDE PRESS ENTERPRISE.

SAN BERNARDINO

	*	**	
LEADING STORES:			
Albertson's	4		Own, Fullerton, CA
Alpa Beta	20		Own, La Habra, CA
Base Commissary	4		na
Circle K (C)	39		A.M. Lewis, Riverside, CA
Fedco	2		na
Food 4 Less	1		na
Gerards	2		A.M. Lewis, Riverside, CA
Grocery Warehouse	2		Albertson's, Fullerton, CA
Hughes Market	4		Own, Los Angeles, CA
Lucky	10		Own, Buena Park, CA
Price Club	1		na
Ralph's	2		Own, Compton, CA
Stater Bros.	39		Own, Colton, CA
7-Eleven (C)	35		Own, San Bernardino, CA
Stop'N Go (C)	6		A.M. Lewis, Riverside, CA
Vons	18		Own, Los Angeles, CA
OTHER GROCERY STORES	na		
TOTAL	184		

na not available (C) Convenience Stores
* In-house estimates. **Share of Market Data is unobtainable.

Market Area Covered:
RIVERSIDE-SAN BERNARDINO, CA

Rank in U.S. based on supermarket sales in 1990: 15

	U.S.	PMSA Total	Central City Riverside	Central City San Bernardino
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$16,765	$7,584	$9,180
Food Store Sales (mil.)	$362,667	$3,419	$1,604	$1,815
% of total retail sales	20.1%	20.4%	21.1%	19.8%
Supermarket Sales (mil.)	$340,455	$3,273	$1,535	$1,737
% of Food Store Sales	93.9%	95.7%	95.7%	95.7%
Supermarket Sales per capita	$1,357	$1,202	$1,236	$1,172
POPULATION 1990 TOTAL (thous.)	250,812	2,724	1,242	1,482
Total Number of Households (thous.)	92,735	914	427	486
Population by Age of Household Head				
Under 25 Years	5.5%	5.8%	5.4%	6.4%
25 - 34 Years	21.6%	24.5%	22.7%	26.1%
35 - 44 Years	22.2%	23.1%	21.5%	24.5%
45 - 54 Years	15.6%	14.6%	14.0%	15.0%
55 - 64 Years	13.5%	11.9%	12.4%	11.5%
65 and Over	21.7%	20.0%	23.9%	16.7%
Number of Persons per Household				
% by # of persons per household				
One	24.5%	19.7%	20.6%	18.9%
Two	32.0%	31.0%	33.0%	29.2%
Three	17.4%	17.0%	15.9%	17.9%
Four	15.1%	16.4%	15.2%	17.5%
Five	6.7%	8.8%	8.2%	9.3%
Six and Over	4.2%	7.3%	7.0%	7.4%
Average Household Size	2.7	2.98	2.91	3.05
INCOME 1990				
Net EBI (mil.)	3,499,365	36,541	17,203	19,339
Per Capita EBI	13,952	13,414	13,850	13,050
Median Household EBI	27,912	29,951	29,016	30,889
Household by EBI Groups				
% Distribution				
Under $10,000	16.2%	13.5%	13.3%	13.6%
$10,000 - $24,999	28.9%	28.5%	29.9%	27.1%
$25,000 and Over	55.0%	58.1%	56.9%	59.0%
Projected EBI % change 1990/95	35.6%	49.6%	52.9%	46.7%
Projected average household EBI				
% change 1990/95	29.2%	25.7%	26.7%	24.9%

16. SEATTLE, WASHINGTON – PMSA

King and Snohomish Counties

	No. of Stores*	% of Market Share*	Principal Supplier
LEADING STORES:		68.0%	
Safeway	120	26.0	Own, Bellevue, WA
Albertson's	47	12.0	West Coast Grocery, Inc., Bellevue, WA
Quality Food Centers	25	6.0	West Coast Grocery, Inc., Bellevue, WA
Thriftway	26	5.0	Assoc. Grocers, Kent, WA
Johnny's Foodcenters	7	2.0	Assoc. Grocers, Kent, WA
Olson's Food Stores, Inc.	10	3.0	Assoc. Grocers, Kent, WA
Fred Meyer	18	6.0	Own, Seattle, WA
Haggens/Top Foods	7	3.0	West Coast Grocery, Bellevue, WA
Thrifty Foods	15	2.3	Assoc. Grocers, Kent, WA
Puget Consumers' Coop	6	2.0	NutraSource, Seattle, Wa
OTHER GROCERY STORES	na	26.0%	
ANY CONVENIENCE	na	2.0%	
WHOLESALE**			
Costco/Price Savers	6	4.0%	
TOTAL	203	100.0%	

na not available
* In-house estimates.
**Costco and Price Savers carry grocery store items and sell to members in bulk.

Market Area Covered:
SEATTLE, WA

Rank in U.S. based on supermarket sales in 1990: 16

	U.S.	PMSA Total
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$17,681
Food Store Sales (mil.)	$362,667	$3,457
% of total retail sales	20.1%	19.6%
Supermarket Sales (mil.)	$340,455	$3,272
% of Food Store Sales	93.9%	94.6%
Supermarket Sales per capita	$1,357	$1,631
POPULATION 1990 TOTAL (thous.)	250,812	2,007
Total Number of Households (thous.)	92,735	801
Population by Age of Household Head		
Under 25 Years	5.5%	6.0%
25 - 34 Years	21.6%	24.6%
35 - 44 Years	22.2%	25.3%
45 - 54 Years	15.6%	15.9%
55 - 64 Years	13.5%	11.2%
65 and Over	21.7%	17.1%
Number of Persons per Household		
% by # of persons per household		
One	24.5%	27.3%
Two	32.0%	34.2%
Three	17.4%	16.4%
Four	15.1%	13.9%
Five	6.7%	5.4%
Six and Over	4.2%	2.9%
Average Household Size	2.7	2.5
INCOME 1990		
Net EBI (mil.)	3,499,365	36,003
Per Capita EBI	13,952	17,941
Median Household EBI	27,912	36,423
Household by EBI Groups		
% Distribution		
Under $10,000	16.2%	11.2%
$10,000 - $24,999	28.9%	22.2%
$25,000 and Over	55.0%	66.7%
Projected EBI % change 1990/95	35.6%	47.3%
Projected average household EBI		
% change 1990/95	29.2%	34.0%

17. ST LOUIS, MISSOURI-ILLINOIS - MSA

Franklin, Jefferson, St. Charles, St. Louis Counties; and part of Crawford Counties - MO
Clinton, Jersey, Madison, Monroe and St. Clair Counties - IL

	No. of Stores*	% of Market Share*	Principal Supplier
LEADING STORES:		82.0%	
Schnucks	60	31.0	Own, Bridgeton, MO
Wetterau	127	16.0	Own, Hazelwood, MO
National	40	15.0	Own, St. Louis, MO
A-G	200	10.0	Own, St. Louis, MO
Dierberg's	10	7.0	J.M. Jones, Chesterfield, MO
OTHER GROCERY STORES	na	21.0%	
TOTAL	437	100.0%	

na not available
Note: Above information kindly provided by the ST. LOUIS POST-DISPATCH.

Market Area Covered:
ST. LOUIS, MO

Rank in U.S. based on supermarket sales in 1990: 17

	U.S.	PMSA Total	Central City St. Louis
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$18,178	$2,395
Food Store Sales (mil.)	$362,667	$3,440	$515
% of total retail sales	20.1%	18.9%	21.5%
Supermarket Sales (mil.)	$340,455	$3,252	$479
% of Food Store Sales	93.9%	94.5%	93.0%
Supermarket Sales per capita	$1,357	$1,324	$1,223
POPULATION 1990 TOTAL (thous.)	250,812	2,457	392
Total Number of Households (thous.)	92,735	929	382
Population by Age of Household Head			
Under 25 Years	5.5%	4.5%	3.7%
25 - 34 Years	21.6%	22.3%	21.2%
35 - 44 Years	22.2%	21.9%	22.5%
45 - 54 Years	15.6%	15.5%	16.5%
55 - 64 Years	13.5%	13.9%	14.6%
65 and Over	21.7%	22.0%	21.4%
Number of Persons per Household			
% by # of persons per household			
One	24.5%	25.7%	24.6%
Two	32.0%	31.0%	33.0%
Three	17.4%	17.5%	17.5%
Four	15.1%	15.3%	15.2%
Five	6.7%	6.8%	6.5%
Six and Over	4.2%	3.7%	3.1%
Average Household Size	2.7	2.64	2.61
INCOME 1990			
Net EBI (mil.)	3,499,365	36,859	5,133
Per Capita EBI	13,952	15,002	13,108
Median Household EBI	27,912	31,099	37,192
Household by EBI Groups			
% Distribution			
Under $10,000	16.2%	13.7%	7.8%
$10,000 - $24,999	28.9%	26.0%	22.2%
$25,000 and Over	55.0%	60.3%	70.1%
Projected EBI % change 1990/95	35.6%	35.7%	31.9%
Projected average household EBI			
% change 1990/95	29.2%	30.0%	37.3%

18. SAN DIEGO, CALIFORNIA – MSA

San Diego County

	No. of Stores*	% of Market Share*	Principal Supplier
LEADING CHAINS:		95.4%	
Vons	65	36.9	Own, El Monte, CA
Lucky	30	19.1	Own, Buena Park, CA
Ralph's	17	15.5	Own, Compton, CA
Military Commissaries	4	6.9	Buy Direct
Alpha Beta	17	6.5	Own, La Habra, CA
Big Bear	23	4.4	Own, San Diego, CA
Advantage	na	2.5	na
Price Club	na	2.2	na
Albertson's	3	1.4	Own, Brea, CA
OTHER GROCERY STORES	na	4.6%	
TOTAL	158	100.0%	

na not available

Note: Above information kindly provided by Union-Tribune Publishing Co.

Market Area Covered:
SAN DIEGO, CA

Rank in U.S. based on supermarket sales in 1990: 18

	U.S.	MSA Total
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$19,209
Food Store Sales (mil.)	$362,667	$3,415
% of total retail sales	20.1%	17.8%
Supermarket Sales (mil.)	$340,455	$3,145
% of Food Store Sales	93.9%	92.1%
Supermarket Sales per capita	$1,357	$1,227
POPULATION 1990 TOTAL (thous.)	250,812	2,563
Total Number of Households (thous.)	92,735	912
Population by Age of Household Head		
Under 25 Years	5.5%	7.2%
25 - 34 Years	21.6%	24.9%
35 - 44 Years	22.2%	23.1%
45 - 54 Years	15.6%	14.3%
55 - 64 Years	13.5%	11.5%
65 and Over	21.7%	18.9%
Number of Persons per Household		
% by # of persons per household		
One	24.5%	22.9%
Two	32.0%	33.8%
Three	17.4%	17.0%
Four	15.1%	14.1%
Five	6.7%	6.7%
Six and Over	4.2%	5.5%
Average Household Size	2.7	2.81
INCOME 1990		
Net EBI (mil.)	3,499,365	41,179
Per Capita EBI	13,952	16,067
Median Household EBI	27,912	32,016
Household by EBI Groups		
% Distribution		
Under $10,000	16.2%	11.7%
$10,000 - $24,999	28.9%	27.0%
$25,000 and Over	55.0%	61.2%
Projected EBI % change 1990/95	35.6%	43.5%
Projected average household EBI % change 1990/95	29.2%	27.5%

19. TAMPA–ST. PETERSBURG–CLEARWATER, FLORIDA – MSA

Hernando, Hillsborough, Pasco and Pinellas Counties

	No. of Stores	% of Area Volume*	Principal Supplier
MAJOR CHAIN STORES:			
Publix	61	29.2	Own, Lakeland, FL
Kash 'n Karry	71	19.7	Own, Tampa, FL
Winn Dixie	62	19.3	Own, Orlando, FL
Albertson's	14	7.8	Own, Orlando, FL
Jewel Osco	5	4.4	Own, Super Foods, Orlando, FL
Food Lion	12	6.6	Own, Salisbury, NC
Save And Pack	4	2.4	Wetterau, Kirkwood, MO
U-Save	14	2.0	na
CONVENIENCE STORES**	618	3.0%	
OTHERS (Includes Independents)	942	5.8%	
TOTAL	1,803	100.0%	

na not available
* Based on % of adult shoppers who "shopped most" during the past week at the store(s) listed.
**Includes farm stores.

Note: Information kindly provided by THE TAMPA TRIBUNE and THE ST. PETERSBURG TIMES.

Market Area Covered:
TAMPA, FL

Rank in U.S. based on supermarket sales in 1990: 19

	U.S.	MSA Total
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$16,911
Food Store Sales (mil.)	$362,667	$3,264
% of total retail sales	20.1%	19.3%
Supermarket Sales (mil.)	$340,455	$3,083
% of Food Store Sales	93.9%	94.5%
Supermarket Sales per capita	$1,357	$1,461
POPULATION 1990 TOTAL (thous.)	250,812	2,110
Total Number of Households (thous.)	92,735	887
Population by Age of Household Head		
Under 25 Years	5.5%	4.7%
25 - 34 Years	21.6%	18.3%
35 - 44 Years	22.2%	18.1%
45 - 54 Years	15.6%	13.2%
55 - 64 Years	13.5%	13.5%
65 and Over	21.7%	32.1%
Number of Persons per Household		
% by # of persons per household		
One	24.5%	27.9%
Two	32.0%	39.6%
Three	17.4%	14.9%
Four	15.1%	10.9%
Five	6.7%	4.3%
Six and Over	4.2%	2.3%
Average Household Size	2.7	2.38
INCOME 1990		
Net EBI (mil.)	3,499,365	29,695
Per Capita EBI	13,952	14,073
Median Household EBI	27,912	24,976
Household by EBI Groups		
% Distribution		
Under $10,000	16.2%	15.7%
$10,000 - $24,999	28.9%	34.4%
$25,000 and Over	55.0%	50.0%
Projected EBI % change 1990/95	35.6%	44.8%
Projected average household EBI		
% change 1990/95	29.2%	30.1%

20. BALTIMORE, MARYLAND – MSA

Anne Arundel, Baltimore, Carroll, Harford, Howard and Queen Anne Counties; Baltimore City

	No. of Stores*	% of Market Share*	Principal Supplier
LEADING STORES:		74.0%	
Giant	37	23.0	Own, Landover, MD
A&P	31	11.0	Own, Baltimore, MD
Food A Rama	17	8.0	Super Rite Food, Inc., Randallstown, MD
Mars	11	8.0	Own, Baltimore, MD
Safeway	15	7.0	Own, Landover, MD
Acme	14	5.0	American Stores Co., Philadelphia, PA
Big B Warehouses	14	4.0	B. Green & Co., Inc., Baltimore, MD
Santonis, Inc.	6	3.0	B. Green & Co., Inc., Baltimore, MD
Super Pride Markets	7	3.0	PA & S Small Co., Baltimore, MD
Military	3	2.0	Buy Direct
OTHER GROCERY STORES	na	26.0%	
TOTAL	155	100.0%	

na not available
* In-house estimates.

Market Area Covered:
BALTIMORE, MD

Rank in U.S. based on supermarket sales in 1990: 20

	U.S.	PMSA Total	Central City Baltimore
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$17,489	$3,312
Food Store Sales (mil.)	$362,667	$3,315	$699
% of total retail sales	20.1%	19.0%	21.1%
Supermarket Sales (mil.)	$340,455	$3,065	$612
% of Food Store Sales	93.9%	92.5%	87.6%
Supermarket Sales per capita	$1,357	$1,274	$834
POPULATION 1990 TOTAL (thous.)	250,812	2,405	733
Total Number of Households (thous.)	92,735	889	276
Population by Age of Household Head			
Under 25 Years	5.5%	4.6%	5.8%
25 - 34 Years	21.6%	22.2%	21.4%
35 - 44 Years	22.2%	23.2%	20.7%
45 - 54 Years	15.6%	16.4%	14.2%
55 - 64 Years	13.5%	13.6%	13.8%
65 and Over	21.7%	19.9%	24.3%
Number of Persons per Household			
% by # of persons per household			
One	24.5%	23.5%	30.5%
Two	32.0%	31.3%	27.6%
Three	17.4%	19.2%	17.4%
Four	15.1%	15.8%	12.3%
Five	6.7%	6.4%	6.2%
Six and Over	4.2%	3.7%	5.8%
Average Household Size	2.7	2.71	2.66
INCOME 1990			
Net EBI (mil.)	3,499,365	36,180	8,716
Per Capita EBI	13,952	15,044	11,884
Median Household EBI	27,912	33,440	23,207
Household by EBI Groups			
% Distribution			
Under $10,000	16.2%	12.6%	22.5%
$10,000 - $24,999	28.9%	24.2%	30.5%
$25,000 and Over	55.0%	63.4%	46.8%
Projected EBI % change 1990/95	35.6%	30.2%	21.8%
Projected average household EBI			
% change 1990/95	29.2%	22.6%	23.5%

21. OAKLAND, CALIFORNIA – PMSA

Alameda and Contra Costa Counties

	No. of Stores*	% of Market Share*	Principal Supplier
LEADING CHAINS:		80.0%	
Safeway	49	34.0	Own, Fremont, CA
Lucky	56	33.0	Own, San Leandro, CA
Frys	10	6.0	Certified Grocers of CA, El Sobrante, CA
Nob Hill	4	3.0	Certified Grocers of CA, Gilroy, CA
Pak N Save	2	2.0	Fleming Co., Inc., San Francisco, CA
Military	2	2.0	Buy Direct
OTHER GROCERY STORES	na	20.0%	
TOTAL	123	100.0%	

na not available
* In-house estimates.

Market Area Covered:
OAKLAND, CA

Rank in U.S. based on supermarket sales in 1990: 21

	U.S.	PMSA Total
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$16,201
Food Store Sales (mil.)	$362,667	$3,185
% of total retail sales	20.1%	19.7%
Supermarket Sales (mil.)	$340,455	$2,962
% of Food Store Sales	93.9%	93.0%
Supermarket Sales per capita	$1,357	$1,403
POPULATION 1990 TOTAL (thous.)	250,812	2,112
Total Number of Households (thous.)	92,735	791
Population by Age of Household Head		
Under 25 Years	5.5%	5.1%
25 - 34 Years	21.6%	22.6%
35 - 44 Years	22.2%	25.3%
45 - 54 Years	15.6%	16.9%
55 - 64 Years	13.5%	12.1%
65 and Over	21.7%	18.0%
Number of Persons per Household		
% by # of persons per household		
One	24.5%	25.0%
Two	32.0%	32.4%
Three	17.4%	17.4%
Four	15.1%	14.5%
Five	6.7%	6.2%
Six and Over	4.2%	4.4%
Average Household Size	2.7	2.67
INCOME 1990		
Net EBI (mil.)	3,499,365	38,361
Per Capita EBI	13,952	18,166
Median Household EBI	27,912	38,096
Household by EBI Groups		
% Distribution		
Under $10,000	16.2%	11.9%
$10,000 - $24,999	28.9%	21.2%
$25,000 and Over	55.0%	67.1%
Projected EBI % change 1990/95	35.6%	36.2%
Projected average household EBI % change 1990/95	29.2%	28.2%

22. NEWARK, NEW JERSEY - PMSA

Essex, Morris, Sussex and Union Counties

	No. of Stores	% of Market Share	Principal Supplier
LEADING STORES:		71.0%	
Pathmark	18	21.0	na
A&P	38	14.0	Own, Edison & Montvale, NJ
Shop Rite	28	11.0	Wakefern Food Corp., Springfield, NJ
Mayfair	8	8.0	Twn County Grocers, Inc., Elizabeth, NJ
Acme	12	6.0	American Store Co., Whippany, NJ
Kings	11	6.0	White Rose, West Caldwell, NJ
Grand Union	8	5.0	Own, Elmwood Park, NJ
Foodtown	34	na	
OTHER GROCERY STORES	119	na	
TOTAL	276		

na not available

Market Area Covered:
NEWARK, NJ

Rank in U.S. based on supermarket sales in 1990: 22

	U.S.	PMSA Total
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$13,633
Food Store Sales (mil.)	$362,667	$3,073
% of total retail sales	20.1%	22.5%
Supermarket Sales (mil.)	$340,455	$2,808
% of Food Store Sales	93.9%	91.4%
Supermarket Sales per capita	$1,357	$1,541
POPULATION 1990 TOTAL (thous.)	250,812	1,823
Total Number of Households (thous.)	92,735	651
Population by Age of Household Head		
Under 25 Years	5.5%	3.1%
25 - 34 Years	21.6%	19.3%
35 - 44 Years	22.2%	22.9%
45 - 54 Years	15.6%	18.0%
55 - 64 Years	13.5%	15.0%
65 and Over	21.7%	21.6%
Number of Persons per Household		
% by # of persons per household		
One	24.5%	23.3%
Two	32.0%	29.0%
Three	17.4%	18.6%
Four	15.1%	16.6%
Five	6.7%	7.7%
Six and Over	4.2%	4.9%
Average Household Size	2.7	2.8
INCOME 1990		
Net EBI (mil.)	3,499,365	34,974
Per Capita EBI	13,952	19,188
Median Household EBI	27,912	40,296
Household by EBI Groups		
% Distribution		
Under $10,000	16.2%	11.5%
$10,000 - $24,999	28.9%	19.5%
$25,000 and Over	55.0%	69.1%
Projected EBI % change 1990/95	35.6%	27.6%
Projected average household EBI % change 1990/95	29.2%	29.0%

23. PITTSBURGH, PENNSYLVANIA – PMSA

Allegheny, Fayette, Washington and Westmoreland Counties

	No. of Stores*	% of Market Share*	Principal Supplier
LEADING STORES:		43.0%	
Giant Eagle	56	39.0	OK Grocery Co., Pittsburgh, PA
Super Valu	1	2.0	Charley Bros. Co., Minneapolis, MN
U Save Foods	4	2.0	Penn Traffic Co., Johnstown, PA
INDEPENDENTS	179	55.0%	Various
OTHER GROCERY STORES	na	2.0%	
TOTAL	240	100.0%	

na not available
* In-house estimates.

Market Area Covered:
PITTSBURGH, PA

Rank in U.S. based on supermarket sales in 1990: 23

	U.S.	PMSA Total
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$14,184
Food Store Sales (mil.)	$362,667	$2,906
% of total retail sales	20.1%	20.5%
Supermarket Sales (mil.)	$340,455	$2,719
% of Food Store Sales	93.9%	93.6%
Supermarket Sales per capita	$1,357	$1,328
POPULATION 1990 TOTAL (thous.)	250,812	2,047
Total Number of Households (thous.)	92,735	816
Population by Age of Household Head		
Under 25 Years	5.5%	3.8%
25 - 34 Years	21.6%	17.8%
35 - 44 Years	22.2%	19.9%
45 - 54 Years	15.6%	14.3%
55 - 64 Years	13.5%	15.7%
65 and Over	21.7%	28.7%
Number of Persons per Household		
% by # of persons per household		
One	24.5%	27.9%
Two	32.0%	32.6%
Three	17.4%	17.4%
Four	15.1%	14.2%
Five	6.7%	5.6%
Six and Over	4.2%	2.3%
Average Household Size	2.7	2.51
INCOME 1990		
Net EBI (mil.)	3,499,365	28,920
Per Capita EBI	13,952	14,127
Median Household EBI	27,912	27,271
Household by EBI Groups		
% Distribution		
Under $10,000	16.2%	17.0%
$10,000 - $24,999	28.9%	28.9%
$25,000 and Over	55.0%	54.0%
Projected EBI % change 1990/95	35.6%	19.5%
Projected average household EBI		
% change 1990/95	29.2%	20.2%

24. DENVER, COLORADO – PMSA

Adams, Arapahoe, Denver, Douglas and Jefferson Counties

	No. of Stores	% of Market Share	Principal Supplier
LEADING CHAINS:		65.0%	
King Soopers (Kroger Co.)	48	40.0	Own, Denver, CO
Safeway	59	16.0	Own, Denver, CO
Albertson's	28	9.0	Own, Denver, CO
Grocery Warehouse	5	*	Albertson's, Denver, CO
Alfalfa's	3	*	na
La Petite Boulangerie	13	*	na
Orchards	1	*	na
LEADING INDEPENDENTS:		8.0%	
Cub Foods	6	8.0	Super Valu, Denver, CO
Nobel Sysco	3	*	Own, Denver, CO
Sax Foods	1	*	na
LEADING CONVENIENCE STORES:			
PDQ	8	*	na
7-Eleven	113	*	McLane Western, Denver, CO
Shop 'n Go	19	*	na
Tenneco	13	*	na
U-Tote-M	26	*	na
OTHER GROCERY STORES	na	27.0%	
TOTAL	328	100.0%	

na not available
* Included in "Other Grocery Stores" percent.

Market Area Covered:
DENVER, CO

Rank in U.S. based on supermarket sales in 1990: 24

	U.S.	MSA Total	Central City Denver
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$12,998	$3,652
Food Store Sales (mil.)	$362,667	$2,616	$852
% of total retail sales	20.1%	20.1%	23.3%
Supermarket Sales (mil.)	$340,455	$2,520	$817
% of Food Store Sales	93.9%	96.3%	95.9%
Supermarket Sales per capita	$1,357	$1,543	$1,758
POPULATION 1990 TOTAL (thous.)	250,812	1,633	465
Total Number of Households (thous.)	92,735	653	210
Population by Age of Household Head			
Under 25 Years	5.5%	5.8%	6.7%
25 - 34 Years	21.6%	25.4%	24.8%
35 - 44 Years	22.2%	26.2%	22.9%
45 - 54 Years	15.6%	15.8%	12.9%
55 - 64 Years	13.5%	11.6%	11.5%
65 and Over	21.7%	15.2%	21.5%
Number of Persons per Household			
% by # of persons per household			
One	24.5%	28.6%	40.6%
Two	32.0%	32.2%	31.0%
Three	17.4%	16.4%	12.9%
Four	15.1%	14.2%	9.1%
Five	6.7%	5.7%	4.3%
Six and Over	4.2%	2.9%	2.9%
Average Household Size	2.7	2.5	2.22
INCOME 1990			
Net EBI (mil.)	3,499,365	26,342	7,026
Per Capita EBI	13,952	16,128	15,116
Median Household EBI	27,912	33,138	24,810
Household by EBI Groups			
% Distribution			
Under $10,000	16.2%	11.0%	18.1%
$10,000 - $24,999	28.9%	25.6%	32.4%
$25,000 and Over	55.0%	63.4%	49.6%
Projected EBI % change 1990/95	35.6%	45.3%	34.9%
Projected average household EBI			
% change 1990/95	29.2%	37.8%	36.9%

25. MIAMI-HIALEAH, FL - PMSA

Dade County

	No. of Stores*	% of Market Share*	Principal Supplier
LEADING CHAINS:		82.0%	
Winn Dixie	52	32.0	Own, Pompano Beach, FL
Publix	42	26.0	Own, North Miami, FL
Pantry Pride/Sun	18	8.0	Malone & Hyde, Pompano Beach, FL
Sedanos	18	8.0	Assoc. Grocers of Florida, Inc., Hialeah, FL
Xtra Super	4	8.0	Malone & Hyde, Pompano Beach, FL
INDEPENDENTS	46	17.0%	Various
OTHER GROCERY STORES	na	1.0%	
TOTAL	180	100.0%	

na not available

Note: Above information kindly provided by the MIAMI HERALD.

Market Area Covered:
MIAMI, FL

Rank in U.S. based on supermarket sales in 1990: 25

	U.S.	PMSA Total
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$15,113
Food Store Sales (mil.)	$362,667	$2,705
% of total retail sales	20.1%	17.9%
Supermarket Sales (mil.)	$340,455	$2,455
% of Food Store Sales	93.9%	90.8%
Supermarket Sales per capita	$1,357	$1,251
POPULATION 1990 TOTAL (thous.)	250,812	1,963
Total Number of Households (thous.)	92,735	702
Population by Age of Household Head		
Under 25 Years	5.5%	4.3%
25 - 34 Years	21.6%	19.7%
35 - 44 Years	22.2%	21.1%
45 - 54 Years	15.6%	17.1%
55 - 64 Years	13.5%	15.0%
65 and Over	21.7%	22.9%
Number of Persons per Household		
% by # of persons per household		
One	24.5%	24.9%
Two	32.0%	29.1%
Three	17.4%	17.5%
Four	15.1%	14.5%
Five	6.7%	7.6%
Six and Over	4.2%	6.4%
Average Household Size	2.7	2.8
INCOME 1990		
Net EBI (mil.)	3,499,365	25,533
Per Capita EBI	13,952	13,007
Median Household EBI	27,912	26,243
Household by EBI Groups		
% Distribution		
Under $10,000	16.2%	19.0%
$10,000 - $24,999	28.9%	28.9%
$25,000 and Over	55.0%	52.3%
Projected EBI % change 1990/95	35.6%	35.2%
Projected average household EBI		
% change 1990/95	29.2%	28.4%

26. CLEVELAND, OHIO – PMSA

Cuyahoga Counties

	No. of Stores*	% of Market Share**	Principal Supplier
LEADING STORES:			
Acme/Click	2		Fred W. Albrecht Grocery Co., Akron, OH
Bi-Rite/Sparkle	7		na
Carl's	3		Own, Bedford Heights, OH
Convenient Food Mart	93		na
Dairy Mart	112		na
Dave's	4		na
Eagle	15		Own, Youngstown, OH
Finast	24		na
Food Centre	10		na
Heinen's	9		Own, Bedford Heights, OH
Pick 'N Pay	10		na
Sav Mor	11		na
Stop'N Shop	50		Own, Bedford Heights, OH
Twin Valu	1		na
OTHER GROCERY STORES	na		
TOTAL	351		

na not available
* In-house estimates.
**Share of Market Data is unobtainable.

Market Area Covered:
CLEVELAND, OH

Rank in U.S. based on supermarket sales in 1990: 26

	U.S.	PMSA Total
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$13,074
Food Store Sales (mil.)	$362,667	$2,510
% of total retail sales	20.1%	19.2%
Supermarket Sales (mil.)	$340,455	$2,301
% of Food Store Sales	93.9%	91.7%
Supermarket Sales per capita	$1,357	$1,260
POPULATION 1990 TOTAL (thous.)	250,812	1,826
Total Number of Households (thous.)	92,735	710
Population by Age of Household Head		
Under 25 Years	5.5%	3.9%
25 - 34 Years	21.6%	20.1%
35 - 44 Years	22.2%	21.3%
45 - 54 Years	15.6%	15.5%
55 - 64 Years	13.5%	14.8%
65 and Over	21.7%	24.4%
Number of Persons per Household		
% by # of persons per household		
One	24.5%	27.9%
Two	32.0%	31.1%
Three	17.4%	16.8%
Four	15.1%	14.1%
Five	6.7%	6.5%
Six and Over	4.2%	3.5%
Average Household Size	2.7	2.57
INCOME 1990		
Net EBI (mil.)	3,499,365	27,194
Per Capita EBI	13,952	14,894
Median Household EBI	27,912	29,946
Household by EBI Groups		
% Distribution		
Under $10,000	16.2%	16.1%
$10,000 - $24,999	28.9%	25.9%
$25,000 and Over	55.0%	58.2%
Projected EBI % change 1990/95	35.6%	30.9%
Projected average household EBI		
% change 1990/95	29.2%	31.4%

27. KANSAS CITY, MISSOURI-KANSAS - MSA

Cass, Clay, Jackson, Lafayette, Platte and Ray Counties - MO
Johnson, Leavenworth, Miami and Wyandotte Counties - KS

Kansas City, MO

	No. of Stores*	% of Market Share*	Principal Supplier
LEADING STORES:		45.0%	
Food Barn	35	17.0	Safeway, Kansas City, MO
Bali's	13	9.0	Assoc. Wholesale Grocers I, Kansas City, KS
Bob's IGA	9	7.0	Wetterau Food Distributors Group, Kansas City, MO
Dahl's	3	4.0	Super Valu Stores, Inc., Des Moines, IA
Dillon	4	4.0	Kroger, Hutchinson, KS
Aldi	3	1.0	Own, Wright City, MO
Falleys	1	1.0	Assoc., Topeka, KS
Franks Foodland	5	1.0	Wetterau, Inc., Kansas City, MO
Save U More	1	1.0	Hy-Vee Food Stores, Inc., Chariton, IA
INDEPENDENTS	139	53.0%	Various
OTHER GROCERY STORES	na	2.0%	
TOTAL	213	100.0%	

na not available * In-house estimates.

Kansas City, KS

	*	**	
LEADING STORES:			
Bali's	5		Own, Kansas City, KS
Food Barn	2		Own, Kansas City, MO
Milgram's	6		Wetterau, F.D.G., Kansas City, MO
Price Chopper	2		Assoc., Kansas City, KS
Safeway	4		Own, Kansas City, MO
Thriftway	5		Assoc., Kansas City, KS
United Super	3		Fleming Co., Inc. Kansas City, MO
OTHER GROCERY STORES	na		
TOTAL	27	100.0%	

na not available * In-house estimates.
** Share of Market Data is unobtainable.

Market Area Covered:
KANSAS CITY, MO

Rank in U.S. based on supermarket sales in 1990: 27

	U.S.	MSA Total
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$12,486
Food Store Sales (mil.)	$362,667	$2,346
% of total retail sales	20.1%	18.8%
Supermarket Sales (mil.)	$340,455	$2,265
% of Food Store Sales	93.9%	96.5%
Supermarket Sales per capita	$1,357	$1,429
POPULATION 1990 TOTAL (thous.)	250,812	1,585
Total Number of Households (thous.)	92,735	609
Population by Age of Household Head		
Under 25 Years	5.5%	5.4%
25 - 34 Years	21.6%	23.6%
35 - 44 Years	22.2%	23.0%
45 - 54 Years	15.6%	15.6%
55 - 64 Years	13.5%	13.0%
65 and Over	21.7%	19.5%
Number of Persons per Household		
% by # of persons per household		
One	24.5%	25.9%
Two	32.0%	32.2%
Three	17.4%	17.2%
Four	15.1%	15.1%
Five	6.7%	6.2%
Six and Over	4.2%	3.1%
Average Household Size	2.7	2.6
INCOME 1990		
Net EBI (mil.)	3,499,365	24,362
Per Capita EBI	13,952	15,373
Median Household EBI	27,912	31,212
Household by EBI Groups		
% Distribution		
Under $10,000	16.2%	13.3%
$10,000 - $24,999	28.9%	26.4%
$25,000 and Over	55.0%	60.4%
Projected EBI % change 1990/95	35.6%	37.7%
Projected average household EBI		
% change 1990/95	29.2%	28.5%

28. SAN FRANCISCO, CALIFORNIA – PMSA

Marin, San Francisco and San Mateo Counties

	No. of Stores*	% of Market Share*	Principal Supplier
LEADING STORES:		82.0%	
Safeway	45	42.0	Own, Fremont, CA
Lucky	16	14.0	Own, San Leandro, CA
Cala/QFI/Beth/Black's	21	12.0	Fleming Co., Inc., South San Francisco, CA
Petrini's	10	6.0	Fleming Co., Inc., South, San Francisco, CA
Alpha Beta	3	3.0	Fleming Co., Inc., Fremont, CA
Albertson's	3	2.0	Fleming Co., Inc. South San Francisco, CA
Military	4	2.0	Buy Direct
Frys	1	1.0	Cert. Grocers of CA, El Sobrante, CA
INDEPENDENTS	41	10.0%	
OTHER GROCERY STORES	na	8.0%	
TOTAL	144	100.0%	

na not available
* In-house estimates.

Market Area Covered:
SAN FRANCISCO, CA

Rank in U.S. based on supermarket sales in 1990: 28

	U.S.	PMSA Total	Central City San Francisco
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$15,259	$6,774
Food Store Sales (mil.)	$362,667	$2,667	$1,162
% of total retail sales	20.1%	17.5%	17.2%
Supermarket Sales (mil.)	$340,455	$2,232	$864
% of Food Store Sales	93.9%	83.7%	74.4%
Supermarket Sales per capita	$1,357	$1,385	$1,193
POPULATION 1990 TOTAL (thous.)	250,812	1,612	724
Total Number of Households (thous.)	92,735	646	306
Population by Age of Household Head			
Under 25 Years	5.5%	4.2%	4.9%
25 - 34 Years	21.6%	21.2%	22.6%
35 - 44 Years	22.2%	24.2%	23.6%
45 - 54 Years	15.6%	16.4%	14.4%
55 - 64 Years	13.5%	13.0%	12.1%
65 and Over	21.7%	21.1%	22.2%
Number of Persons per Household			
% by # of persons per household			
One	24.5%	32.4%	39.3%
Two	32.0%	32.4%	30.1%
Three	17.4%	14.7%	12.4%
Four	15.1%	11.0%	8.5%
Five	6.7%	5.0%	4.6%
Six and Over	4.2%	4.6%	4.9%
Average Household Size	2.7	2.5	2.37
INCOME 1990			
Net EBI (mil.)	3,499,365	33,842	15,116
Per Capita EBI	13,952	20,998	20,870
Median Household EBI	27,912	38,826	34,127
Household by EBI Groups			
% Distribution			
Under $10,000	16.2%	10.4%	13.4%
$10,000 - $24,999	28.9%	21.2%	23.6%
$25,000 and Over	55.0%	68.5%	62.8%
Projected EBI % change 1990/95	35.6%	30.0%	28.3%
Projected average household EBI % change 1990/95	29.2%	29.4%	32.0%

29. NEW ORLEANS, LOUISIANA – MSA

Jefferson, Orleans, St. Bernard, St. Charles, St. John the Baptist and St. Tammany Parishes

	No. of Stores*	% of Market Share*	Principal Supplier
LEADING STORES:		85.0%	
Winn-Dixie	38	29.0	Own, New Orleans, LA
Schwegmann Giant	13	24.0	Own, New Orleans, LA
National	18	14.0	Own, Harahan, LA
A&P	13	8.0	Own, New Orleans, LA
Delchamp	15	9.0	Own, Mobile, AL
Sunflower	2	1.0	Lewis Grocer Co., Indianola, MS
INDEPENDENTS	45	14.0%	Various
OTHER GROCERY STORES	na	1.0%	
TOTAL	144	100.0%	

na not available
* In-house estimates.

Market Area Covered:
NEW ORLEANS, LA

Rank in U.S. based on supermarket sales in 1990: 29

	U.S.	MSA Total	Central City New Orleans
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$9,783	$7,473
Food Store Sales (mil.)	$362,667	$2,360	$1,289
% of total retail sales	20.1%	24.1%	17.2%
Supermarket Sales (mil.)	$340,455	$2,229	$1,177
% of Food Store Sales	93.9%	94.4%	91.3%
Supermarket Sales per capita	$1,357	$1,803	$1,375
POPULATION 1990 TOTAL (thous.)	250,812	1,236	856
Total Number of Households (thous.)	92,735	454	326
Population by Age of Household Head			
Under 25 Years	5.5%	5.3%	4.6%
25 - 34 Years	21.6%	22.0%	21.1%
35 - 44 Years	22.2%	23.6%	21.8%
45 - 54 Years	15.6%	15.9%	15.9%
55 - 64 Years	13.5%	13.7%	14.1%
65 and Over	21.7%	19.8%	22.7%
Number of Persons per Household			
% by # of persons per household			
One	24.5%	26.4%	25.1%
Two	32.0%	28.0%	32.8%
Three	17.4%	18.1%	18.1%
Four	15.1%	15.2%	15.3%
Five	6.7%	7.3%	6.1%
Six and Over	4.2%	4.8%	2.8%
Average Household Size	2.7	2.72	2.62
INCOME 1990			
Net EBI (mil.)	3,499,365	15,171	14,908
Per Capita EBI	13,952	12,271	17,416
Median Household EBI	27,912	25,409	35,983
Household by EBI Groups			
% Distribution			
Under $10,000	16.2%	20.5%	10.7%
$10,000 - $24,999	28.9%	29.1%	23.0%
$25,000 and Over	55.0%	50.7%	66.5%
Projected EBI % change 1990/95	35.6%	41.0%	31.0%
Projected average household EBI			
% change 1990/95	29.2%	41.0%	26.4%

30. FT. WORTH–ARLINGTON, TEXAS – PMSA

Johnson, Parker and Tarrant Counties

	No. of Stores	% of Market Share	Principal Supplier
LEADING STORES:		77.0%	
Kroger	17	16.0	Own, Irving, TX
Winn Dixie	33	16.0	Own, Forth Worth, TX
Skagg's Alpha Beta	12	14.0	na
Minyard/Sack N Sav/Carnival	20	11.0	Minyards, Coppell, TX
Albertson's	8	11.0	Own, San Antonio, TX
Tom Thumb	8	9.0	Own, Dallas, TX
Food Lion	17	*	
OTHER GROCERY STORES	na	23.0%	
TOTAL	115	100.0%	

na not available

Note: Above information kindly provided by FORT WORTH STAR-TELEGRAM.
* Opening in Fall 1991-1992.

Market Area Covered:
FORT WORTH-ARLINGTON, TX

Rank in U.S. based on supermarket sales in 1990: 30

	U.S.	PMSA Total
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$10,951
Food Store Sales (mil.)	$362,667	$2,284
% of total retail sales	20.1%	20.9%
Supermarket Sales (mil.)	$340,455	$2,208
% of Food Store Sales	93.9%	96.7%
Supermarket Sales per capita	$1,357	$1,622
POPULATION 1990 TOTAL (thous.)	250,812	1,361
Total Number of Households (thous.)	92,735	506
Population by Age of Household Head		
Under 25 Years	5.5%	7.3%
25 - 34 Years	21.6%	27.5%
35 - 44 Years	22.2%	23.5%
45 - 54 Years	15.6%	15.6%
55 - 64 Years	13.5%	11.5%
65 and Over	21.7%	14.6%
Number of Persons per Household		
% by # of persons per household		
One	24.5%	23.9%
Two	32.0%	31.2%
Three	17.4%	18.4%
Four	15.1%	16.0%
Five	6.7%	6.7%
Six and Over	4.2%	3.8%
Average Household Size	2.7	2.69
INCOME 1990		
Net EBI (mil.)	3,499,365	20,155
Per Capita EBI	13,952	14,809
Median Household EBI	27,912	31,118
Household by EBI Groups		
% Distribution		
Under $10,000	16.2%	13.0%
$10,000 - $24,999	28.9%	26.7%
$25,000 and Over	55.0%	60.3%
Projected EBI % change 1990/95	35.6%	58.2%
Projected average household EBI		
% change 1990/95	29.2%	39.9%

31. SACRAMENTO, CALIFORNIA – MSA

El Dorado, Placer, Sacramento and Yolo Counties

	No. of Stores	% of Market Share	Principal Supplier
LEADING CHAINS:		68.0%	
Lucky	27	20.0	Own, San Leandro, CA
Raley's	22	17.0	Fleming Foods, Sacramento, CA
Bel Air	14	11.0	Gergro, Stockton, CA
Albertson's	16	9.0	Fleming Foods, Fremont, CA
Safeway	11	6.0	Own, Sacramento, CA
Pak N'Save	3	3.0	Own, Milpitas, CA
Jumbo	5	2.0	Fleming Foods, Fremont, CA
OTHER GROCERY STORES	na	32.0%	
TOTAL	94	100.0%	

na not available

Note: Above information kindly provided by THE SACRAMENTO BEE.

Market Area Covered:
SACRAMENTO, CA

Rank in U.S. based on supermarket sales in 1990: 31

	U.S.	MSA Total	Central City Sacramento
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$11,482	$8,330
Food Store Sales (mil.)	$362,667	$2,309	$1,602
% of total retail sales	20.1%	20.1%	19.2%
Supermarket Sales (mil.)	$340,455	$2,202	$1,517
% of Food Store Sales	93.9%	95.4%	94.7%
Supermarket Sales per capita	$1,357	$1,446	$1,417
POPULATION 1990 TOTAL (thous.)	250,812	1,523	1,071
Total Number of Households (thous.)	92,735	573	407
Population by Age of Household Head			
Under 25 Years	5.5%	6.6%	6.6%
25 - 34 Years	21.6%	23.4%	24.3%
35 - 44 Years	22.2%	24.1%	23.6%
45 - 54 Years	15.6%	15.4%	15.0%
55 - 64 Years	13.5%	12.4%	12.3%
65 and Over	21.7%	18.2%	17.9%
Number of Persons per Household			
% by # of persons per household			
One	24.5%	23.9%	25.3%
Two	32.0%	34.0%	33.2%
Three	17.4%	17.5%	17.2%
Four	15.1%	14.5%	13.8%
Five	6.7%	6.1%	5.9%
Six and Over	4.2%	4.0%	4.2%
Average Household Size	2.7	2.66	2.64
INCOME 1990			
Net EBI (mil.)	3,499,365	24,040	17,163
Per Capita EBI	13,952	15,782	16,031
Median Household EBI	27,912	31,903	32,358
Household by EBI Groups			
% Distribution			
Under $10,000	16.2%	12.9%	12.8%
$10,000 - $24,999	28.9%	26.5%	26.0%
$25,000 and Over	55.0%	60.4%	61.2%
Projected EBI % change 1990/95	35.6%	44.7%	45.3%
Projected average household EBI % change 1990/95	29.2%	26.8%	27.2%

32. BERGEN-PASSAIC, NEW JERSEY - PMSA

Bergen and Passaic Counties

	No. of Stores*	% of Market Share*	Principal Supplier
LEADING STORES:		82.0%	
Grand Union	22	19.0	Own, Elmwood Park, NJ
A&P	26	16.0	Own, Montvale, NJ
Pathmark	11	14.0	Supermarket Gen'l. Corp., Woodbridge, NJ
Inserra	11	14.0	Wakefern Food Corp., Mahwak, NJ
Kings	6	5.0	White Rose Food Corp., West Caldwell, NJ
Acme	6	5.0	American Stores Co., Whippany, NJ
Foodtown	6	4.0	Twin County Grocers, Inc., Paramus, NJ
Singer Shop Rite	2	3.0	Wakefern Food Corp., North Bergen, NJ
Mayfair Food Town	3	2.0	Twin County Grocers, inc., Elizabeth, NJ
INDEPENDENTS	29	18.0%	Various
OTHER GROCERY STORES	na		
TOTAL	124	100.0%	

na not available
* In-house estimates.

Market Area Covered:
BERGEN-PASSAIC, NJ

Rank in U.S. based on supermarket sales in 1990: 32

	U.S.	MSA Total	Central County Bergen	Central County Passaic
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$12,424	$8,668	$3,756
Food Store Sales (mil.)	$362,667	$2,273	$1,616	$658
% of total retail sales	20.1%	18.3%	18.6%	17.5%
Supermarket Sales (mil.)	$340,455	$2,087	$1,494	$593
% of Food Store Sales	93.9%	91.8%	92.5%	90.1%
Supermarket Sales per capita	$1,357	$1,634	$1,814	$1,308
POPULATION 1990 TOTAL (thous.)	250,812	1,277	824	453
Total Number of Households (thous.)	92,735	464	308	155
Population by Age of Household Head				
Under 25 Years	5.5%	2.6%	1.9%	3.2%
25 - 34 Years	21.6%	17.7%	16.9%	19.3%
35 - 44 Years	22.2%	21.6%	21.4%	34.8%
45 - 54 Years	15.6%	17.5%	17.5%	16.7%
55 - 64 Years	13.5%	16.2%	16.9%	14.8%
65 and Over	21.7%	24.6%	25.3%	23.2%
Number of Persons per Household				
% by # of persons per household				
One	24.5%	22.7%	23.0%	21.9%
Two	32.0%	30.6%	31.8%	28.3%
Three	17.4%	18.6%	18.5%	18.7%
Four	15.1%	16.4%	16.2%	16.7%
Five	6.7%	7.3%	6.8%	8.4%
Six and Over	4.2%	4.3%	3.6%	6.4%
Average Household Size	2.7	2.75	2.67	2.92
INCOME 1990				
Net EBI (mil.)	3,499,365	27,078	19,873	7,205
Per Capita EBI	13,952	21,206	24,127	15,898
Median Household EBI	27,912	44,360	49,681	35,168
Household by EBI Groups				
% Distribution				
Under $10,000	16.2%	8.8%	6.5%	13.5%
$10,000 - $24,999	28.9%	18.1%	15.6%	22.5%
$25,000 and Over	55.0%	73.1%	77.9%	63.7%
Projected EBI % change 1990/95	35.6%	28.7%	29.5%	26.4%
Projected average household EBI				
% change 1990/95	29.2%	29.9%	30.3%	20.6%

33. CINCINNATI, OHIO-KENTUCKY-INDIANA - PMSA

Clermont, Hamilton and Warren Counties - OH
Boone, Campbell and Kenton Counties - KY
Dearborn County - IN

	No. of Stores	% of Market Share	Principal Supplier
LEADING CHAINS:		75.2%	
Kroger	47	46.4	Own, Cincinnati, OH
Thriftway	17	18.8	Own, Cincinnati, OH
Bigg's	1	8.0	na
Marsh's	2	2.0	Own, Yorktown, IN
Convenience Food Mart	43	*	na
Food Mart	1	*	na
King Kwik	104	*	na
Stop'N Go	11	*	na
Super Valu	7	*	na
United Dairy Farmers	82	*	na
White Villa	27	*	na
VOLUNTARY &/OR COOP GROUPS:		14.0%	
IGA	51	14.0	Super Food Services, Bellefontaine, OH
U-Tote-M	19	*	na
OTHER GROCERY STORES	na	10.6%	
TOTAL	412	100.0%	

na not available
* Included in "Other Grocery Stores" percent.
Note: Above information kindly provided by the CINCINNATI ENQUIRER. According to this source, Cincinnati has experienced no changes since last year.

Market Area Covered:
CINCINNATI, OH

Rank in U.S. based on supermarket sales in 1990: 33

	U.S.	PMSA Total
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$10,883
Food Store Sales (mil.)	$362,667	$2,190
% of total retail sales	20.1%	20.1%
Supermarket Sales (mil.)	$340,455	$2,036
% of Food Store Sales	93.9%	93.0%
Supermarket Sales per capita	$1,357	$1,397
POPULATION 1990 TOTAL (thous.)	250,812	1,458
Total Number of Households (thous.)	92,735	550
Population by Age of Household Head		
Under 25 Years	5.5%	5.8%
25 - 34 Years	21.6%	22.9%
35 - 44 Years	22.2%	22.0%
45 - 54 Years	15.6%	14.9%
55 - 64 Years	13.5%	13.6%
65 and Over	21.7%	20.7%
Number of Persons per Household		
% by # of persons per household		
One	24.5%	26.3%
Two	32.0%	30.0%
Three	17.4%	17.4%
Four	15.1%	15.4%
Five	6.7%	7.1%
Six and Over	4.2%	3.6%
Average Household Size	2.7	2.65
INCOME 1990		
Net EBI (mil.)	3,499,365	21,061
Per Capita EBI	13,952	14,447
Median Household EBI	27,912	29,424
Household by EBI Groups		
% Distribution		
Under $10,000	16.2%	15.4%
$10,000 - $24,999	28.9%	27.1%
$25,000 and Over	55.0%	57.6%
Projected EBI % change 1990/95	35.6%	41.8%
Projected average household EBI		
% change 1990/95	29.2%	37.3%

34. SAN ANTONIO, TEXAS – MSA

Bexar, Comal, and Guadalupe Counties

	No. of Stores*	% of Market Share*	Principal Supplier
LEADING CHAINS:		84.4%*	
H.E.B.	36	38.2	Own, Corpus Christi, TX
Kroger	14	14.9	Own, Houston, TX
Albertson's	10	14.0	Fleming Co., San Antonio, TX
Handy Andy	19	11.5	Sweeney & Co., San Antonio, TX
Commissaries (Base)*	4	5.8	Buy Direct
LEADING INDEPENDENTS:		4.3%	
Warehouse Groceries	9	4.3	Own, San Antonio, TX
OTHER GROCERY STORES	30	11.3%	
TOTAL	122	100.0%	

na not available
* In-house estimates.

Market Area Covered:
SAN ANTONIO, TX

Rank in U.S. based on supermarket sales in 1990: 34

	U.S.	PMSA Total
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$9,157
Food Store Sales (mil.)	$362,667	$2,069
% of total retail sales	20.1%	22.6%
Supermarket Sales (mil.)	$340,455	$1,998
% of Food Store Sales	93.9%	96.6%
Supermarket Sales per capita	$1,357	$1,509
POPULATION 1990 TOTAL (thous.)	250,812	1,324
Total Number of Households (thous.)	92,735	459
Population by Age of Household Head		
Under 25 Years	5.5%	23.5%
25 - 34 Years	21.6%	22.9%
35 - 44 Years	22.2%	15.5%
45 - 54 Years	15.6%	13.1%
55 - 64 Years	13.5%	19.0%
65 and Over	21.7%	24.8%
Number of Persons per Household		
% by # of persons per household		
One	24.5%	22.9%
Two	32.0%	28.8%
Three	17.4%	17.9%
Four	15.1%	15.9%
Five	6.7%	8.3%
Six and Over	4.2%	6.3%
Average Household Size	2.7	2.89
INCOME 1990		
Net EBI (mil.)	3,499,365	15,039
Per Capita EBI	13,952	11,359
Median Household EBI	27,912	23,865
Household by EBI Groups		
% Distribution		
Under $10,000	16.2%	19.2%
$10,000 - $24,999	28.9%	32.9%
$25,000 and Over	55.0%	47.7%
Projected EBI % change 1990/95	35.6%	47.0%
Projected average household EBI		
% change 1990/95	29.2%	33.6%

35. NORFOLK-VA. BEACH-NEWPORT NEWS, VIRGINIA - MSA

Gloucester, James City and York Counties

NORFOLK - VIRGINIA BEACH

	No. of Stores	% of Market Share	Principal Supplier
LEADING CHAINS:		36.1%	
Food Lion	38	31.0	Own, Salisbury, NC
7-Eleven (C)	170	*	Southland Distribution Center, Fredericksburg, VA
Super Fresh	15	5.1	A&P Distribution Center, Baltimore, MD
VOLUNTARY &/OR COOP GROUPS:			
Farm Fresh	33	34.1	Richfood, Richmond, VA
Belo	25	6.8	Camellia Food Stores, Inc. Norfolk, VA
Gene Walters' Marketplace	13	10.9	Richfood, Richmond, VA
OTHER GROCERY STORE	199	18.7%	
TOTAL	449	**	

(C) Convenience Stores
* Included in Other Grocery Stores percent.
**Total does not equal 100% due to averaging.
Note: Above information kindly provided by THE VIRGINIAN-PILOT/LEDGER STAR.

NEWPORT NEWS

LEADING STORES:			
Farm Fresh (Nicks, Food Carnival)	21	50.4	Richfoods, Richmond, VA
Food Lion	15	32.8	Own, Salisbury, NC
Super Fresh/A&P	9	10.6	Richfoods, Richmond, VA
Belo	5	4.0	Camellia Food Stores, Inc., Norfolk, VA
Safeway	1	2.2	na
OTHER GROCERY STORES	na		
TOTAL	51	100.0%	

Note: Above information kindly provided by the NEWPORT NEWS DAILY PRESS.

Market Area Covered:
NORFOLK-VIRGINIA BEACH-
NEWPORT NEWS, VA
Rank in U.S. based on supermarket
sales in 1990: 35

	U.S.	PMSA Total	Central City Norfolk	Central City Virginia Beach
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$10,395	$2,001	$2,925
Food Store Sales (mil.)	$362,667	$2,057	$381	$614
% of total retail sales	20.1%	19.8%	19.0%	21.0%
Supermarket Sales (mil.)	$340,455	$1,978	$353	$598
% of Food Store Sales	93.9%	96.2%	92.7%	97.4%
Supermarket Sales per capita	$1,357	$1,394	$1,344	$1,482
POPULATION 1990 TOTAL (thous.)	250,812	1,419	263	403
Total Number of Households (thous.)	92,735	502	90	139
Population by Age of Household Head				
Under 25 Years	5.5%	8.0%	12.2%	7.9%
25 - 34 Years	21.6%	26.9%	26.6%	30.9%
35 - 44 Years	22.2%	22.9%	18.9%	25.8%
45 - 54 Years	15.6%	14.5%	11.1%	14.4%
55 - 64 Years	13.5%	11.7%	11.1%	10.1%
65 and Over	21.7%	16.1%	20.0%	10.1%
Number of Persons per Household				
% by # of persons per household				
One	24.5%	21.1%	26.6%	17.2%
Two	32.0%	31.7%	32.2%	31.6%
Three	17.4%	20.1%	17.8%	21.5%
Four	15.1%	16.7%	13.3%	18.7%
Five	6.7%	7.0%	6.7%	7.9%
Six and Over	4.2%	3.6%	4.4%	3.6%
Average Household Size	2.7	2.83	2.92	2.9
INCOME 1990				
Net EBI (mil.)	3,499,365	18,356	3,046	5,928
Per Capita EBI	13,952	12,932	11,595	14,695
Median Household EBI	27,912	27,790	21,294	34,191
Household by EBI Groups				
% Distribution				
Under $10,000	16.2%	14.5%	21.1%	8.6%
$10,000 - $24,999	28.9%	30.7%	37.7%	25.1%
$25,000 and Over	55.0%	55.2%	43.3%	65.3%
Projected EBI % change 1990/95	35.6%	38.5%	30.2%	47.4%
Projected average household EBI				
% change 1990/95	29.2%	25.4%	25.4%	27.7%

36. SAN JOSE, CALIFORNIA – PMSA

Santa Clara County

	No. of Stores	% of Market Share	Principal Supplier
LEADING CHAINS:		74.0%	
Lucky	35	34.0	Own, San Leandro, CA
Safeway	29	22.0	Own, Fremont, CA
Fry's	10	8.0	Certified Grocers, Los Angeles, CA
Nob Hill	12	6.0	Fleming Foods, San Leandro, CA
P.W. Super	8	3.0	United Grocers, Richmond, CA
7-Eleven (C)	106	1.0	United Grocers, Cupertino, CA
Pak-n-Save	3	*	Safeway, Fremont, CA
Petrini's	4	*	Market Wholesale Grocery Corp., Fresno, CA
Stop'N Go (C)	13	*	United Grocers, Richmond, CA
LEADING INDEPENDENTS:		6.0%	
H & S Food Villa	1	3.0	United Grocers, Richmond, CA
Micalis Food Villa	1	3.0	United Grocers, Richmond, CA
Consentino	2	*	Own, San Jose, CA
Co-op Supermarkets	2	*	United Grocers, San Jose, CA
Lunardis	2	*	na
OTHER GROCERY STORES	na	20.0%	
TOTAL	228	100.0%	

na not available
* Included in "Other Grocery Stores" percent.

Note: Above information kindly provided by the SAN JOSE MERCURY NEWS.

Market Area Covered:
SAN JOSE, CA

Rank in U.S. based on supermarket sales in 1990: 36

	U.S.	PMSA Total
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$12,499
Food Store Sales (mil.)	$362,667	$2,131
% of total retail sales	20.1%	17.0%
Supermarket Sales (mil.)	$340,455	$1,968
% of Food Store Sales	93.9%	92.4%
Supermarket Sales per capita	$1,357	$1,301
POPULATION 1990 TOTAL (thous.)	250,812	1,513
Total Number of Households (thous.)	92,735	526
Population by Age of Household Head		
Under 25 Years	5.5%	4.8%
25 - 34 Years	21.6%	25.7%
35 - 44 Years	22.2%	24.7%
45 - 54 Years	15.6%	17.9%
55 - 64 Years	13.5%	12.4%
65 and Over	21.7%	14.6%
Number of Persons per Household		
% by # of persons per household		
One	24.5%	21.7%
Two	32.0%	31.4%
Three	17.4%	17.7%
Four	15.1%	15.4%
Five	6.7%	7.2%
Six and Over	4.2%	6.5%
Average Household Size	2.7	2.88
INCOME 1990		
Net EBI (mil.)	3,499,365	29,611
Per Capita EBI	13,952	19,572
Median Household EBI	27,912	45,662
Household by EBI Groups		
% Distribution		
Under $10,000	16.2%	7.0%
$10,000 - $24,999	28.9%	16.7%
$25,000 and Over	55.0%	76.1%
Projected EBI % change 1990/95	35.6%	32.4%
Projected average household EBI % change 1990/95	29.2%	28.8%

37. FORT LAUDERDALE-HOLLYWOOD-POMPANO BEACH, FLORIDA - PMSA

Broward County

	No. of Stores	% of Market Share	Principal Supplier
LEADING CHAINS:		93.0%	
Winn-Dixie	50	35.0	Own, Pompano Beach, FL
Publix	53	33.0	Own, Miami, FL
Albertson's	8	10.0	Super Food Services, Orlando, FL
Pantry Pride/Sun	7	6.0	Malone & Hyde Inc., Miami, FL
Pic-N-Pay/Payless/Buy Rite	4	4.0	Assoc. Grocers, Miami, FL
Great Value	2	3.0	Assoc. Grocers, Miami, FL
7-Eleven (C)	82	2.0	Southland Corp., Orlando, FL
Circle K (C)	35	*	McLane Southeast, Athens, GA
Cumberland Farms	17	*	Certified Grocers, Ocala, FL
Farm Stores	54	*	McLane Southeast, Lakeland, FL
Food Spot	11	*	Assoc. Grocers, Miami, FL
Majik Markets	5	*	Own, Atlanta, GA
Stop 'N Go (C)	5	*	McLane Southeast, Lakeland, FL
Xtra Super Food Centers	3	*	Malone & Hyde, Inc., Pompano Beach, FL
VOLUNTARY &/OR COOP GROUPS:		1.5%	
Associated Grocers	23	1.5	Assoc. Grocers, Miami, FL
LEADING INDEPENDENTS:		0.7%	
Sureway	1	0.3	Malone & Hyde, Inc., Pompano Beach FL
Coral Ridge Market	1	0.2	Assoc. Grocers, Miami, FL
Oceanside Market	1	0.2	Malone & Hyde, Inc. Pompano Beach, FL
OTHER GROCERY STORES	na	4.8%	
TOTAL	362	100.0%	

na not available
(C) Convenience store
* Included in "Other Grocery Stores" percent.

Note: Above information kindly provided by THE FORT LAUDERDALE NEWS/SUN-SENTINEL.

Market Area Covered:
FORT LAUDERDALE, FL

Rank in U.S. based on supermarket sales in 1990: 37

	U.S.	PMSA Total
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$12,065
Food Store Sales (mil.)	$362,667	$2,156
% of total retail sales	20.1%	17.9%
Supermarket Sales (mil.)	$340,455	$1,940
% of Food Store Sales	93.9%	90.0%
Supermarket Sales per capita	$1,357	$1,518
POPULATION 1990 TOTAL (thous.)	250,812	1,278
Total Number of Households (thous.)	92,735	538
Population by Age of Household Head		
Under 25 Years	5.5%	3.9%
25 - 34 Years	21.6%	19.0%
35 - 44 Years	22.2%	19.5%
45 - 54 Years	15.6%	13.7%
55 - 64 Years	13.5%	12.1%
65 and Over	21.7%	31.8%
Number of Persons per Household		
% by # of persons per household		
One	24.5%	29.5%
Two	32.0%	37.2%
Three	17.4%	14.5%
Four	15.1%	11.1%
Five	6.7%	4.6%
Six and Over	4.2%	2.8%
Average Household Size	2.7	2.38
INCOME 1990		
Net EBI (mil.)	3,499,365	21,697
Per Capita EBI	13,952	16,972
Median Household EBI	27,912	30,411
Household by EBI Groups		
% Distribution		
Under $10,000	16.2%	11.9%
$10,000 - $24,999	28.9%	28.6%
$25,000 and Over	55.0%	59.5%
Projected EBI % change 1990/95	35.6%	44.8%
Projected average household EBI		
% change 1990/95	29.2%	30.5%

38. MILWAUKEE, WISCONSIN – PMSA

Milwaukee, Ozaukee, Washington and Waukesha Counties

	No. of Stores	% of Market Share	Principal Supplier
LEADING STORES:		87.0%	
Pick 'N Save	27	44.0	Roundy's, Milwaukee, WI
Sentry	45	17.0	Godfrey, Waukesha, WI
Kohls II	41	13.0	A&P, Milwaukee, WI
Cub Foods	4	8.0	Super Valu, Stillwater, MN
Piggly Wiggly	8	5.0	Schultz Sav-O-Stores, Sheboygan, WI
OTHER GROCERY STORES	na	13.0%	
TOTAL	125	100.0%	

na not available
Note: Above information kindly provided by the MILWAUKEE JOURNAL.

Market Area Covered:
MILWAUKEE, WI

Rank in U.S. based on supermarket sales in 1990: 38

	U.S.	PMSA Total
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$11,215
Food Store Sales (mil.)	$362,667	$1,977
% of total retail sales	20.1%	17.6%
Supermarket Sales (mil.)	$340,455	$1,867
% of Food Store Sales	93.9%	94.4%
Supermarket Sales per capita	$1,357	$1,299
POPULATION 1990 TOTAL (thous.)	250,812	1,437
Total Number of Households (thous.)	92,735	539
Population by Age of Household Head		
Under 25 Years	5.5%	5.4%
25 - 34 Years	21.6%	22.6%
35 - 44 Years	22.2%	22.4%
45 - 54 Years	15.6%	15.0%
55 - 64 Years	13.5%	13.5%
65 and Over	21.7%	21.1%
Number of Persons per Household		
% by # of persons per household		
One	24.5%	25.4%
Two	32.0%	31.7%
Three	17.4%	17.1%
Four	15.1%	15.2%
Five	6.7%	6.9%
Six and Over	4.2%	3.9%
Average Household Size	2.7	2.66
INCOME 1990		
Net EBI (mil.)	3,499,365	22,622
Per Capita EBI	13,952	15,745
Median Household EBI	27,912	33,549
Household by EBI Groups		
% Distribution		
Under $10,000	16.2%	11.5%
$10,000 - $24,999	28.9%	24.7%
$25,000 and Over	55.0%	64.0%
Projected EBI % change 1990/95	35.6%	37.6%
Projected average household EBI		
% change 1990/95	29.2%	34.0%

39. MONMOUTH–OCEAN, NEW JERSEY – PMSA

Monmouth and Ocean Counties

	No. of Stores*	% of Market Share*	Principal Supplier
LEADING CHAINS:		41.0%	
Pathmark	9	15.0	Own, Edison, NJ
A&P	13	10.0	Own, Edison, NJ
Grand Union	6	9.0	Own, Wayne, NJ
Acme	9	7.0	Own, Malverne, PA
VOLUNTARY &/OR COOP GROUPS:		46.0%	
Shop Rite	14	23.0	Wakefern Food Corp., Elizabeth, NJ
Food Town	22	23.0	Twin City Grocers, Edison, NJ
LEADING CONVENIENCE STORES:			
Cumberland Farms	49	**	Own, Canton, MA
Fresh Farms	1	**	na
Krauzer's	34	**	Own, Edison, NJ
Quick Chek	17	**	Own, Whitehouse, NJ
7-Eleven	37	**	Own, Willow Grove, PA
Wawa	9	**	Own, Wawa, PA
OTHER GROCERY STORES	na	13.0%	
TOTAL	220	100.0%	

na not available
* In-house estimates.
**Included in "Other Grocery Stores" percent.

Market Area Covered:
MONMOUTH-OCEAN, NJ

Rank in U.S. based on supermarket sales in 1990: 39

	U.S.	PMSA Total	Central County Monmouth	Central County Ocean
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$8,593	$5,082	$3,511
Food Store Sales (mil.)	$362,667	$1,830	$1,034	$795
% of total retail sales	20.1%	21.3%	20.3%	22.6%
Supermarket Sales (mil.)	$340,455	$1,719	$968	$751
% of Food Store Sales	93.9%	93.9%	93.6%	94.5%
Supermarket Sales per capita	$1,357	$1,717	$1,728	$1,704
POPULATION 1990 TOTAL (thous.)	250,812	1,001	560	441
Total Number of Households (thous.)	92,735	371	200	171
Population by Age of Household Head				
Under 25 Years	5.5%	2.4%	2.5%	2.3%
25 - 34 Years	21.6%	17.2%	18.5%	15.8%
35 - 44 Years	22.2%	21.5%	24.0%	18.7%
45 - 54 Years	15.6%	15.6%	18.0%	12.9%
55 - 64 Years	13.5%	14.0%	14.5%	12.9%
65 and Over	21.7%	29.1%	22.0%	37.4%
Number of Persons per Household				
% by # of persons per household				
One	24.5%	23.4%	22.0%	25.1%
Two	32.0%	33.1%	30.0%	36.2%
Three	17.4%	16.7%	18.0%	14.6%
Four	15.1%	16.2%	18.0%	14.0%
Five	6.7%	7.3%	8.0%	6.4%
Six and Over	4.2%	3.8%	4.0%	3.5%
Average Household Size	2.7	2.7	2.8	2.57
INCOME 1990				
Net EBI (mil.)	3,499,365	18,769	11,228	7,541
Per Capita EBI	13,952	18,752	20,046	17,108
Median Household EBI	27,912	37,880	42,325	33,329
Household by EBI Groups				
% Distribution				
Under $10,000	16.2%	9.4%	9.0%	9.3%
$10,000 - $24,999	28.9%	23.2%	19.5%	26.9%
$25,000 and Over	55.0%	67.6%	71.5%	63.7%
Projected EBI % change 1990/95	35.6%	39.5%	38.2%	41.5%
Projected average household EBI				
% change 1990/95	29.2%	29.3%	29.3%	29.6%

40. PORTLAND, OREGON – PMSA

Clackamas, Multnomah, Washington and Yamhill Counties

	No. of Stores	% of Shoppers*	Principal Supplier
LEADING STORES:		90.4%	
Fred Meyer	23	22.6	Own, Portland, OR
Safeway	34	21.5	Own, Clackamas, OR
Albertson's	17	12.1	Own, Portland, OR
Thriftway	23	9.2	United Grocers, Inc., Portland, OR
Costco	4	6.8	Various
Food 4 Less	4	4.9	Fleming Food Co., Portland, OR
Cub Food	2	4.1	West Coast Grocery, Salem, OR
Kienow's	13	3.2	United Grocers, Inc., Portland, OR
Food Connection	3	2.5	na
Waremart	2	2.0	West Coast Grocery, Tigard, OR
Sentry	20	1.5	United Grocers, Inc., Portland, OR
OTHER GROCERY STORES	na	9.6%	
TOTAL	145	100.0%	

na not available

* These figures are estimates; percent of shoppers based on store where most money was spent in past seven days.

Note: Above information kindly provided by the PORTLAND OREGONIAN.

Market Area Covered:
PORTLAND, OR

Rank in U.S. based on supermarket sales in 1990: 40

	U.S.	PMSA Total
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$10,812
Food Store Sales (mil.)	$362,667	$1,807
% of total retail sales	20.1%	16.7%
Supermarket Sales (mil.)	$340,455	$1,693
% of Food Store Sales	93.9%	93.7%
Supermarket Sales per capita	$1,357	$1,352
POPULATION 1990 TOTAL (thous.)	250,812	1,252
Total Number of Households (thous.)	92,735	492
Population by Age of Household Head		
Under 25 Years	5.5%	5.7%
25 - 34 Years	21.6%	21.8%
35 - 44 Years	22.2%	25.6%
45 - 54 Years	15.6%	15.7%
55 - 64 Years	13.5%	11.2%
65 and Over	21.7%	20.1%
Number of Persons per Household		
% by # of persons per household		
One	24.5%	26.8%
Two	32.0%	34.0%
Three	17.4%	16.1%
Four	15.1%	14.2%
Five	6.7%	5.7%
Six and Over	4.2%	3.3%
Average Household Size	2.7	2.55
INCOME 1990		
Net EBI (mil.)	3,499,365	18,375
Per Capita EBI	13,952	14,677
Median Household EBI	27,912	29,982
Household by EBI Groups		
% Distribution		
Under $10,000	16.2%	13.4%
$10,000 - $24,999	28.9%	28.3%
$25,000 and Over	55.0%	58.4%
Projected EBI % change 1990/95	35.6%	50.8%
Projected average household EBI		
% change 1990/95	29.2%	43.2%

41. ROCHESTER, NEW YORK - MSA

Livingston, Monroe, Ontario, Orleans and Wayne Counties

	No. of Stores	% of Market Share	Principal Supplier
LEADING CHAINS:		82.0%	
Wegman's Food Markets	29	60.0	Own, Rochester, NY
Tops	14	14.0	Niagara Frontier, Buffalo, NY
Bells	13	8.0	Peter J. Schmitt, Buffalo, NY
VOLUNTARY &/OR COOP GROUPS:		8.0%	
Big M Supermarkets	14	6.0	P&C Foods, Syracuse, NY
Super Duper	14	2.0	S.M. Flickinger Co., Buffalo, NY
OTHER GROCERY STORES	na	10.0%	
TOTAL	84	100.0%	

na not available

Note: Above information kindly provided by the ROCHESTER DEMOCRAT and CHRONICLE/TIMES-UNION.

Market Area Covered:
ROCHESTER, NY

Rank in U.S. based on supermarket sales in 1990: 41

	U.S.	MSA Total
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$7,643
Food Store Sales (mil.)	$362,667	$1,764
% of total retail sales	20.1%	23.1%
Supermarket Sales (mil.)	$340,455	$1,679
% of Food Store Sales	93.9%	95.2%
Supermarket Sales per capita	$1,357	$1,671
POPULATION 1990 TOTAL (thous.)	250,812	1,005
Total Number of Households (thous.)	92,735	376
Population by Age of Household Head		
Under 25 Years	5.5%	5.6%
25 - 34 Years	21.6%	22.4%
35 - 44 Years	22.2%	22.6%
45 - 54 Years	15.6%	15.7%
55 - 64 Years	13.5%	13.0%
65 and Over	21.7%	20.8%
Number of Persons per Household		
% by # of persons per household		
One	24.5%	24.8%
Two	32.0%	32.0%
Three	17.4%	17.6%
Four	15.1%	15.7%
Five	6.7%	6.7%
Six and Over	4.2%	3.2%
Average Household Size	2.7	2.68
INCOME 1990		
Net EBI (mil.)	3,499,365	15,703
Per Capita EBI	13,952	15,626
Median Household EBI	27,912	32,561
Household by EBI Groups		
% Distribution		
Under $10,000	16.2%	12.5%
$10,000 - $24,999	28.9%	25.6%
$25,000 and Over	55.0%	62.1%
Projected EBI % change 1990/95	35.6%	21.0%
Projected average household EBI		
% change 1990/95	29.2%	18.2%

42. MIDDLESEX-SOMERSET-HUNTERDON, NEW JERSEY - PMSA

Middlesex and Somerset Counties

	No. of Stores	% of Market Share*	Principal Supplier
LEADING CHAINS:			
Acme	8		American Stores Co., Whippany, NJ
A&P	13		Own, Montvale, NJ
Foodtown	15		Twin County Grocers, Edison, NJ
Grand Union	4		Own, Wayne, NJ
Pathmark	11		Supermarkets General Corp. Woodbridge, NJ
ShopRite	14		Wakefern Food Corp., Elizabeth, NJ
Super Fresh	1		A&P, Florence, NJ
OTHER GROCERY STORES	na		
TOTAL	66		

na not available
* Share of Market Data is unobtainable.

Note: Above information does not include Hunterdon County.

Market Area Covered:
MIDDLESEX-SOMERSET-HUNTERDON, NJ

Rank in U.S. based on supermarket sales in 1990: 42

	U.S.	PMSA Total	Central County Middlesex
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$8,568	$5,332
Food Store Sales (mil.)	$362,667	$1,797	$1,081
% of total retail sales	20.1%	21.0%	20.3%
Supermarket Sales (mil.)	$340,455	$1,671	$992
% of Food Store Sales	93.9%	93.0%	91.8%
Supermarket Sales per capita	$1,357	$1,620	$1,464
POPULATION 1990 TOTAL (thous.)	250,812	1,031	677
Total Number of Households (thous.)	92,735	369	241
Population by Age of Household Head			
Under 25 Years	5.5%	3.2%	3.7%
25 - 34 Years	21.6%	22.5%	22.8%
35 - 44 Years	22.2%	23.6%	22.8%
45 - 54 Years	15.6%	17.3%	16.2%
55 - 64 Years	13.5%	14.6%	14.5%
65 and Over	21.7%	18.9%	20.3%
Number of Persons per Household			
% by # of persons per household			
One	24.5%	20.8%	21.2%
Two	32.0%	31.9%	31.5%
Three	17.4%	19.2%	19.1%
Four	15.1%	17.1%	17.0%
Five	6.7%	7.3%	7.1%
Six and Over	4.2%	3.5%	3.7%
Average Household Size	2.7	2.79	2.81
INCOME 1990			
Net EBI (mil.)	3,499,365	22,493	13,547
Per Capita EBI	13,952	21,808	19,999
Median Household EBI	27,912	48,591	45,672
Household by EBI Groups			
% Distribution			
Under $10,000	16.2%	6.5%	7.1%
$10,000 - $24,999	28.9%	14.9%	16.2%
$25,000 and Over	55.0%	78.5%	76.3%
Projected EBI % change 1990/95	35.6%	40.3%	36.1%
Projected average household EBI			
% change 1990/95	29.2%	30.3%	28.9%

43. ORLANDO, FLORIDA – MSA

Orange, Osceola and Seminole Counties

	No. of Stores	% of Market Share	Principal Supplier
LEADING STORES:		95.0%	
Publix	36	38.0	Publix, Jacksonville & Lakeland, FL
Winn-Dixie	41	27.0	Own, Orlando, FL and Super Food Services Inc., Orlando, FL
Albertson's, Inc.	10	12.0	Super Food Service Inc., Orlando, FL
Goodings	9	10.0	Own, Higdon, FL
Xtra	2	4.0	Malone & Hyde Inc., Pompano Beach, FL
Food Lion	5	3.0	Own, Green Cove Springs, FL
Piggly Wiggly	3	1.0	
OTHER GROCERY STORES	na	5.0%	
TOTAL	106	100.0%	

Note: Above information kindly provided by the ORLANDO SENTINEL.

Market Area Covered:
ORLANDO, FL

Rank in U.S. based on supermarket sales in 1990: 43

	U.S.	MSA Total
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$9,896
Food Store Sales (mil.)	$362,667	$1,701
% of total retail sales	20.1%	17.2%
Supermarket Sales (mil.)	$340,455	$1,618
% of Food Store Sales	93.9%	95.1%
Supermarket Sales per capita	$1,357	$1,465
POPULATION 1990 TOTAL (thous.)	250,812	1,105
Total Number of Households (thous.)	92,735	414
Population by Age of Household Head		
Under 25 Years	5.5%	6.8%
25 - 34 Years	21.6%	24.9%
35 - 44 Years	22.2%	22.7%
45 - 54 Years	15.6%	15.2%
55 - 64 Years	13.5%	12.6%
65 and Over	21.7%	17.6%
Number of Persons per Household		
% by # of persons per household		
One	24.5%	22.7%
Two	32.0%	34.8%
Three	17.4%	18.4%
Four	15.1%	14.7%
Five	6.7%	6.3%
Six and Over	4.2%	3.4%
Average Household Size	2.7	2.67
INCOME 1990		
Net EBI (mil.)	3,499,365	15,280
Per Capita EBI	13,952	13,831
Median Household EBI	27,912	26,067
Household by EBI Groups		
% Distribution		
Under $10,000	16.2%	13.8%
$10,000 - $24,999	28.9%	30.4%
$25,000 and Over	55.0%	55.5%
Projected EBI % change 1990/95	35.6%	49.4%
Projected average household EBI		
% change 1990/95	29.2%	29.1%

44. COLUMBUS, OHIO - MSA

Delaware, Fairfield, Franklin, Licking, Madison, Pickaway and Union Counties

	No. of Stores*	% of Market Share*	Principal Supplier
LEADING CHAINS:		85.0%	
Kroger	36	36.0	Own, Columbus, OH
Big Bear	35	28.0	Own, Columbus, OH
Meijer	5	10.0	Own, Grand Rapids, MI
Cub Foods	4	6.0	Super Valu, Xenia, OH
Cardinal Food Stores	17	5.0	Own, Columbus, OH
VOLUNTARY &/OR COOP GROUPS:			
IGA (Super Food Services)	20	5.3	Own, Bellefontaine, OH
OTHER GROCERY STORES	na	15.0%	
TOTAL	235	100.0%	

na not available
* In-house estimates.

Market Area Covered:
COLUMBUS, OH

Rank in U.S. based on supermarket sales in 1990: 44

	U.S.	PMSA Total
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$10,567
Food Store Sales (mil.)	$362,667	$1,701
% of total retail sales	20.1%	16.1%
Supermarket Sales (mil.)	$340,455	$1,616
% of Food Store Sales	93.9%	95.0%
Supermarket Sales per capita	$1,357	$1,163
POPULATION 1990 TOTAL (thous.)	250,812	1,390
Total Number of Households (thous.)	92,735	529
Population by Age of Household Head		
Under 25 Years	5.5%	7.9%
25 - 34 Years	21.6%	24.7%
35 - 44 Years	22.2%	22.9%
45 - 54 Years	15.6%	15.1%
55 - 64 Years	13.5%	12.5%
65 and Over	21.7%	17.0%
Number of Persons per Household		
% by # of persons per household		
One	24.5%	25.7%
Two	32.0%	32.5%
Three	17.4%	17.9%
Four	15.1%	15.1%
Five	6.7%	6.0%
Six and Over	4.2%	2.8%
Average Household Size	2.7	2.63
INCOME 1990		
Net EBI (mil.)	3,499,365	18,747
Per Capita EBI	13,952	13,490
Median Household EBI	27,912	27,185
Household by EBI Groups		
% Distribution		
Under $10,000	16.2%	15.9%
$10,000 - $24,999	28.9%	30.2%
$25,000 and Over	55.0%	54.0%
Projected EBI % change 1990/95	35.6%	38.4%
Projected average household EBI		
% change 1990/95	29.2%	31.0%

45. CHARLOTTE – GASTONIA – ROCK HILL, NORTH CAROLINA–SOUTH CAROLINA – MSA

Cabarrus, Gaston, Lincoln, Mecklenburg, Rowan and Union Counties - NC
York County - SC

CHARLOTTE

	No. of Stores*	% of Market Share*	
LEADING CHAINS:		77.0%	
Food Lion	21	26.5	Own, Salisbury, NC
Winn Dixie	10	20.0	Own, Charlotte, NC
Harris-Teeter	21	17.0	Own, Charlotte, NC
Bi-Lo	31	14.0	Own, Greenville, SC
A&P	11	3.4	Own, Charlotte, NC
VOLUNTARY &/OR COOP GROUPS:		2.0%	
Giant Genie	3	1.0	Assoc. Groc. Mutual of Carolina, Charlotte, NC
Park 'N Shop	2	1.0	Assoc. Groc. Mutual of Carolina, Charlotte, NC
OTHER GROCERY STORES	na	21.0%	
TOTAL	72	100.0%	

na not available
* In-house estimates.

GASTONIA - ROCK HILL

		*	
LEADING STORES:			
Bi Lo Inc.	2	29.0	Own, Mauldin, SC
Food Lion	3	20.0	Own, Salisbury, NC
Winn-Dixie	3	10.0	Own, Charolotte, NC
Harris-Teeter	1	8.0	Own, Charlotte, NC
Community Cash	1	3.0	na
OTHER GROCERY STORES	na		
TOTAL	10	100.0%	

na not available
* Percent of Shoppers by Area - primary store for family grocers.

Note: Gastonia-Rock Hill information kindly provided by The ROCK HILL HERALD and covers Rock Hill market only.

Market Area Covered:
CHARLOTTE-GASTONIA-ROCK HILL, NC-SC

Rank in U.S. based on supermarket sales in 1990: 45

	U.S.	MSA Total
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$8,769
Food Store Sales (mil.)	$362,667	$1,646
% of total retail sales	20.1%	18.8%
Supermarket Sales (mil.)	$340,455	$1,604
% of Food Store Sales	93.9%	97.4%
Supermarket Sales per capita	$1,357	$1,358
POPULATION 1990 TOTAL (thous.)	250,812	1,181
Total Number of Households (thous.)	92,735	448
Population by Age of Household Head		
Under 25 Years	5.5%	5.8%
25 - 34 Years	21.6%	23.4%
35 - 44 Years	22.2%	23.0%
45 - 54 Years	15.6%	16.1%
55 - 64 Years	13.5%	13.2%
65 and Over	21.7%	18.3%
Number of Persons per Household		
% by # of persons per household		
One	24.5%	23.2%
Two	32.0%	33.2%
Three	17.4%	19.4%
Four	15.1%	15.8%
Five	6.7%	5.8%
Six and Over	4.2%	2.9%
Average Household Size	2.7	2.64
INCOME 1990		
Net EBI (mil.)	3,499,365	15,831
Per Capita EBI	13,952	13,400
Median Household EBI	27,912	27,374
Household by EBI Groups		
% Distribution		
Under $10,000	16.2%	14.3%
$10,000 - $24,999	28.9%	31.0%
$25,000 and Over	55.0%	54.4%
Projected EBI % change 1990/95	35.6%	44.1%
Projected average household EBI		
% change 1990/95	29.2%	30.4%

46. HARTFORD-NEW BRITAIN-MIDDLETOWN, CONNECTICUT - CMSA

Parts of Hartford, Litchfield, Middlesex, New London and Tolland Counties

	No. of Stores*	% of Market Share*	Principal Supplier
LEADING STORES:		89.0%	
Stop & Shop	14	29.0	Own, North Quincy, MA
Finast	16	21.0	First National, Windsor Locks, CT
Waldbaum's Food Mart	15	17.0	C&S Wholesale Grocers, Inc., Holyoke, MA
Mott's Shop Rite	11	13.0	Wakefern Food, Hartford, CT
Purity/Heartland	3	5.0	Own, North Billerica, MA
A&P	6	2.0	Own, Springfield, MA
Big Y	2	2.0	
INDEPENDENTS	64	2.7%	Various
OTHER GROCERY STORES	na	8.3%	
TOTAL	131	100.0%	

na not available

Note: Above information kindly provided by the HARTFORD COURANT.

Market Area Covered:
HARTFORD, CT

Rank in U.S. based on supermarket sales in 1990: 46

	U.S.	PMSA Total	Central City Hartford
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$9,371	$7,473
Food Store Sales (mil.)	$362,667	$1,706	$1,289
% of total retail sales	20.1%	18.2%	17.2%
Supermarket Sales (mil.)	$340,455	$1,579	$1,177
% of Food Store Sales	93.9%	92.6%	91.3%
Supermarket Sales per capita	$1,357	$1,396	$1,375
POPULATION 1990 TOTAL (thous.)	250,812	1,131	856
Total Number of Households (thous.)	92,735	426	326
Population by Age of Household Head			
Under 25 Years	5.5%	4.7%	4.6%
25 - 34 Years	21.6%	21.6%	21.1%
35 - 44 Years	22.2%	22.3%	21.8%
45 - 54 Years	15.6%	16.2%	15.9%
55 - 64 Years	13.5%	13.6%	14.1%
65 and Over	21.7%	21.8%	22.7%
Number of Persons per Household			
% by # of persons per household			
One	24.5%	24.4%	25.1%
Two	32.0%	33.1%	32.8%
Three	17.4%	18.1%	18.1%
Four	15.1%	15.5%	15.3%
Five	6.7%	6.1%	6.1%
Six and Over	4.2%	2.8%	2.8%
Average Household Size	2.7	2.65	2.62
INCOME 1990			
Net EBI (mil.)	3,499,365	19,587	14,908
Per Capita EBI	13,952	17,323	17,416
Median Household EBI	27,912	36,477	35,983
Household by EBI Groups			
% Distribution			
Under $10,000	16.2%	10.3%	10.7%
$10,000 - $24,999	28.9%	22.5%	23.0%
$25,000 and Over	55.0%	67.3%	66.5%
Projected EBI % change 1990/95	35.6%	32.1%	31.0%
Projected average household EBI			
% change 1990/95	29.2%	26.5%	26.4%

47. SALT LAKE CITY–OGDEN, UTAH – MSA

Davis, Salt Lake and Weber Counties

	No. of Stores	% of Market Share	
LEADING STORES:		86.0%	
Smith's Food King	24	30.0	Own, Layton, UT
Albertson's	15	20.0	Own, Salt Lake City, UT
Harmon's	6	14.0	Fleming Co., West Valley City, UT
Dan's	6	9.0	Associated Food Stores Inc., Salt Lake City, UT
Ream's	8	9.0	Associated Food Stores Inc., Salt Lake City, UT
Military	1	2.0	Buy Direct
INDEPENDENTS	28	13.0%	Various
OTHER GROCERY STORES	na	1.0%	
TOTAL	88	100.0%	

na not available

Note: Above information kindly provided by Newspaper Agency Corp. According to this source, Salt Lake City has experienced no change since last year.

Market Area Covered:
SALT LAKE CITY-OGDEN, UT

Rank in U.S. based on supermarket sales in 1990: 47

	U.S.	MSA Total
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$7,558
Food Store Sales (mil.)	$362,667	$1,629
% of total retail sales	20.1%	21.6%
Supermarket Sales (mil.)	$340,455	$1,554
% of Food Store Sales	93.9%	95.4%
Supermarket Sales per capita	$1,357	$1,435
POPULATION 1990 TOTAL (thous.)	250,812	1,083
Total Number of Households (thous.)	92,735	351
Population by Age of Household Head		
Under 25 Years	5.5%	7.1%
25 - 34 Years	21.6%	25.6%
35 - 44 Years	22.2%	24.2%
45 - 54 Years	15.6%	14.8%
55 - 64 Years	13.5%	11.4%
65 and Over	21.7%	16.8%
Number of Persons per Household		
% by # of persons per household		
One	24.5%	20.5%
Two	32.0%	28.2%
Three	17.4%	15.9%
Four	15.1%	15.1%
Five	6.7%	9.4%
Six and Over	4.2%	10.5%
Average Household Size	2.7	3.09
INCOME 1990		
Net EBI (mil.)	3,499,365	12,020
Per Capita EBI	13,952	11,097
Median Household EBI	27,912	28,274
Household by EBI Groups		
% Distribution		
Under $10,000	16.2%	12.5%
$10,000 - $24,999	28.9%	30.8%
$25,000 and Over	55.0%	56.4%
Projected EBI % change 1990/95	35.6%	45.2%
Projected average household EBI		
% change 1990/95	29.2%	36.3%

48. AUSTIN, TEXAS – MSA

Hays, Travis and Williamson Counties

	No. of Stores	% of Market Share	Principal Supplier
LEADING STORES:		92.0%	
H.E. Butt	21	35.0	Own, Austin, TX
Safeway	18	32.0	Own, Houston, TX
Tom Thumb/Simon David	6	9.0	Cullum, Dallas, TX
Albertson's	1	3.0	Fleming, San Antonio, TX
Fresh Plus	4	2.0	Sweeney, Austin, TX
INDEPENDENTS	14	8.0%	Various
OTHER GROCERY STORES	na		
TOTAL	68	100.0%	

na not available

Note: Above information kindly provided by the AUSTIN AMERICAN-STATESMAN.

Market Area Covered:
AUSTIN, TX

Rank in U.S. based on supermarket sales in 1990: 48

	U.S.	MSA Total
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$6,132
Food Store Sales (mil.)	$362,667	$1,563
% of total retail sales	20.1%	25.5%
Supermarket Sales (mil.)	$340,455	$1,521
% of Food Store Sales	93.9%	97.3%
Supermarket Sales per capita	$1,357	$1,906
POPULATION 1990 TOTAL (thous.)	250,812	798
Total Number of Households (thous.)	92,735	310
Population by Age of Household Head		
Under 25 Years	5.5%	12.6%
25 - 34 Years	21.6%	29.0%
35 - 44 Years	22.2%	24.5%
45 - 54 Years	15.6%	12.9%
55 - 64 Years	13.5%	8.7%
65 and Over	21.7%	11.9%
Number of Persons per Household		
% by # of persons per household		
One	24.5%	29.0%
Two	32.0%	31.9%
Three	17.4%	16.8%
Four	15.1%	13.5%
Five	6.7%	5.8%
Six and Over	4.2%	3.5%
Average Household Size	2.7	2.57
INCOME 1990		
Net EBI (mil.)	3,499,365	11,353
Per Capita EBI	13,952	14,227
Median Household EBI	27,912	26,741
Household by EBI Groups		
% Distribution		
Under $10,000	16.2%	17.4%
$10,000 - $24,999	28.9%	31.6%
$25,000 and Over	55.0%	52.8%
Projected EBI % change 1990/95	35.6%	58.7%
Projected average household EBI		
% change 1990/95	29.2%	39.7%

49. BUFFALO, NEW YORK – PMSA

Erie County

	No. of Stores*	% of Market Share*	Principal Supplier
LEADING STORES:		92.8%	
Bells/Freshmart	27	30.3	Peter J. Schmitt, West Seneca, NY
Super Duper	17	18.3	Scrivner/Flickinger, Buffalo, NY
Tops	26	29.3	Scrivner/Flickinger, Buffalo, NY
Wegman's	5	14.9	Own, Rochester, NY
LEADING CONVENIENCE STORES:			
Convenient Food Mart	33	**	Buffalo, NY (buying office)
Cumberland Farms	13	**	Canton, MA (buying office)
7-Eleven	17	**	Bedford Hills, NY (buying office)
Wilson Farms	38	**	Tops Market, Inc., Buffalo, NY
OTHER GROCERY STORES	na	7.2%	
TOTAL	176		

na not available
* In-house estimates.
**Included in "Other Grocery Stores" percentage.

Market Area Covered:
BUFFALO, NY

Rank in U.S. based on supermarket sales in 1990: 49

	U.S.	PMSA Total
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$6,781
Food Store Sales (mil.)	$362,667	$1,612
% of total retail sales	20.1%	23.8%
Supermarket Sales (mil.)	$340,455	$1,482
% of Food Store Sales	93.9%	91.9%
Supermarket Sales per capita	$1,357	$1,534
POPULATION 1990 TOTAL (thous.)	250,812	966
Total Number of Households (thous.)	92,735	376
Population by Age of Household Head		
Under 25 Years	5.5%	4.8%
25 - 34 Years	21.6%	19.7%
35 - 44 Years	22.2%	20.2%
45 - 54 Years	15.6%	14.6%
55 - 64 Years	13.5%	15.2%
65 and Over	21.7%	25.5%
Number of Persons per Household		
% by # of persons per household		
One	24.5%	27.9%
Two	32.0%	31.4%
Three	17.4%	17.0%
Four	15.1%	14.4%
Five	6.7%	6.4%
Six and Over	4.2%	2.9%
Average Household Size	2.7	2.57
INCOME 1990		
Net EBI (mil.)	3,499,365	13,698
Per Capita EBI	13,952	14,176
Median Household EBI	27,912	28,022
Household by EBI Groups		
% Distribution		
Under $10,000	16.2%	16.8%
$10,000 - $24,999	28.9%	28.2%
$25,000 and Over	55.0%	55.3%
Projected EBI % change 1990/95	35.6%	15.7%
Projected average household EBI		
% change 1990/95	29.2%	15.4%

50. ALBANY-SCHENECTADY-TROY, NEW YORK - MSA

Albany, Greene, Montgomery, Rensselear, Saratoga and Schenectady Counties

	No. of Stores	% of Market Share	Principal Supplier
LEADING STORES:		68.1%	
Price Chopper	25	28.8	Own, Schenectady, NY
Grand Union	29	23.1	Own, Waterford, NY
Great American/Victory	3	6.6	Own, Norwich, NY
Shop & Save	6	4.1	Hannaford Bros., Portland, ME
Star Markets	2	3.7	Own, Albany, NY
Edwards	1	1.8	First National Supermarkets, Windsor Locks, CT
OTHER GROCERY STORES	na	31.9%	
TOTAL	66	100.0%	

na not available

Market Area Covered:
ALBANY-SCHENECTADY-TROY, NY

Rank in U.S. based on supermarket sales in 1990: 50

	U.S.	MSA Total	Central City Albany
RETAIL SALES 1990 TOTAL (mil.)	$1,807,183	$7,045	$3,137
Food Store Sales (mil.)	$362,667	$1,540	$565
% of total retail sales	20.1%	21.9%	18.0%
Supermarket Sales (mil.)	$340,455	$1,458	$524
% of Food Store Sales	93.9%	94.7%	92.7%
Supermarket Sales per capita	$1,357	$1,657	$1,788
POPULATION 1990 TOTAL (thous.)	250,812	880	293
Total Number of Households (thous.)	92,735	338	116
Population by Age of Household Head			
Under 25 Years	5.5%	5.6%	6.9%
25 - 34 Years	21.6%	20.7%	20.7%
35 - 44 Years	22.2%	21.9%	21.6%
45 - 54 Years	15.6%	14.8%	13.8%
55 - 64 Years	13.5%	13.6%	12.9%
65 and Over	21.7%	23.7%	23.3%
Number of Persons per Household			
% by # of persons per household			
One	24.5%	26.9%	30.2%
Two	32.0%	32.2%	31.9%
Three	17.4%	17.2%	16.4%
Four	15.1%	14.8%	12.9%
Five	6.7%	6.2%	5.2%
Six and Over	4.2%	2.7%	2.6%
Average Household Size	2.7	2.6	2.53
INCOME 1990			
Net EBI (mil.)	3,499,365	13,612	4,875
Per Capita EBI	13,952	15,470	16,633
Median Household EBI	27,912	30,420	31,029
Household by EBI Groups			
% Distribution			
Under $10,000	16.2%	12.7%	12.9%
$10,000 - $24,999	28.9%	27.8%	26.7%
$25,000 and Over	55.0%	59.2%	60.3%
Projected EBI % change 1990/95	35.6%	31.1%	28.6%
Projected average household EBI			
% change 1990/95	29.2%	25.7%	26.3%

Section 2: Remaining Markets

Arranged by State and City

ALABAMA

ANNISTON – MSA

Calhoun County

	No. of Stores	% of Market Share*	Principal Supplier
GROCERY STORES:			
Edwards Supermarket	1		Super Valu
Food Outlet	3		Super Valu
Food World	2		Bruno's, Birmingham, AL
Gregerson's	1		Super Valu
Lea & Mike's	4		Super Valu
Windsor's Super Valu	1		Super Valu
Winn-Dixie	6		Own, Montgomery, AL
OTHER GROCERY STORES	na		
TOTAL	18		

na not available
* Share of Market Data is unobtainable.
Note: Above information kindly provided by THE ANNISTON STAR. According to this source Anniston has experienced no changes since last year.

BIRMINGHAM – MSA

Blout, Jefferson, St. Clair, Shelby and Walker Counties

	No. of Stores	% of Market Share*	Principal Supplier
GROCERY STORES:			
Bruno's Food & Pharmacy	4		Bruno's, Birmingham, AL
Delchamps	6		Own, Mobile, AL
Food Fair	12		Bruno's,Birmingham, AL
Food Giant	6		Assoc. Groc. of Ala.
Food Max	4		Bruno's, Birmingham, AL
Food World	16		Bruno's, Birmingham, AL
Piggly Wiggly	18		Own, Bessemer, AL
Vincent's	1		Bruno's, Birmingham, AL Birmingham, AL
Western Super Markets	11		Super Valu, Anniston, AL
Winn Dixie	13		Own, Montgomery, AL
OTHER GROCERY STORES	na		
TOTAL	91		

na not available
* Share of Market Data is unobtainable.

DECATUR – MSA

Lawrence and Morgan Counties	No. of Stores	% of Market Share*	Principal Supplier
GROCERY STORES			
Consumer Warehouse Foods	1		na
Busy Bee	1		na
Family Mart	1		na
Food World	1		na
Giant Foods	1		na
Han-D-Way	3		na
Kroger	2		na
Piggly Wiggly	2		na
Price Buster Foods	2		na
U-Totem	1		na
Wholesale Grocery	1		na
Winn Dixie	1		na
TOTAL	17		

na not available
* Share of Market Data is unobtainable.

DOTHAN – MSA

Dale and Houston Counties	No. of Stores*	% of Market Share**	Principal Supplier
GROCERY STORES:			
A&P	1		Own, Atlanta, GA
Bruno's	1		Own, Birmingham, AL
Dixie Dandy	1		Fleming Foods of AL, Inc., Geneva, AL
Food World	2		Own, Birmingham, AL
IGA	5		Graves Co., Demopolis, AL
Piggly Wiggly	3		Dixieland Food, Geneva, AL
Winn Dixie	2		Own, Montgomery, AL
OTHER GROCERY STORES	na		
TOTAL	15		

na not available
* In-house estimates.
**Share of Market Data is unobtainable.

FLORENCE – MSA

Colbert and Lauderdale Counties	No. of Stores	% of Market Share*	Principal Supplier
GROCERY STORES:			
Big Star	5		Malone & Hyde, Pupleo, MS
Food Max	1		Bruno's, Birmingham, AL
Food World	2		Bruno's, Birmingham, AL
Jitney Jungle	4		Malone & Hyde, Memphis, TN
Shop Rite	7		Mitchell Groc. Corp. Albertville, AL
Wilson's	3		na
Winn Dixie	1		Own, Atlanta, GA
OTHER GROCERY STORES	4		
TOTAL	27		

na not available
* Share of Market Data is unobtainable.

GADSDEN – MSA

Etowah County	No. of Stores	% of Market Share*	Principal Supplier
GROCERY STORES:			
Burton's	3		Assoc. Grocer of AL, Birmingham AL
Food World	3		Own, Birmingham, AL
Gregerson's	3		Super Valu, Anniston, AL
Johnson's	2		Malone and Hyde, Pupleo, MS
Winn Dixie	2		Own, Montgomery, AL
OTHER GROCERY STORES	na		
TOTAL	13		

na not available
* Share of Market Data is unobtainable.

Note: Above information kindly provided by THE GADSDEN TIMES.

HUNTSVILLE - MSA

Madison County	No. of Stores	% of Market Share**	Principal Supplier
GROCERY STORES:			
Kroger	4	41.0	Own, Nashville, TN
Winn Dixie	6	32.0	Own, Atlanta, GA
Bruno's	3	28.0	Own, Birmingham, AL
Food World	4	27.0	Own, Birmingham, AL
Lucky's	3	17.0	Harvey Ragland Co., Inc. Birmingham, AL
Piggly Wiggly	3	5.0	Own, Birmingham, AL
Big Brothers	2	4.0	na
Star Market	1	4.0	na
OTHER GROCERY STORES (Including Independents)	na	14.0%	
TOTAL	26	172.0%*	

na not available
* Due to multiple cross-shopping within the past seven days.
** Based on past seven day shopping.
Base: Adults in Huntsville MSA 174,000.
Source: Marketing Survey conducted by the Capstone Poll, The University of Alabama during February 20-March 7, 1990.
Note: Above information kindly provided by THE HUNTSVILLE TIMES. According to this source, Huntsville has experienced no changes since last year.

MOBILE - MSA

Baldwin and Mobile Counties	No. of Stores	% of Market Share	Principal Supplier
LEADING CHAINS:		98.0%	
Delchamps	27	39.0	Own, Mobile, AL
Food World	10	21.0	Own, Birmingham, AL
Winn Dixie	11	16.0	Own, Montgomery, AL
Greer's	19	14.0	Own, Mobile, AL
Welcome	1	3.0	Own, Jacksonville, FL
Bruno's	1	2.0	Own, Birmingham, AL
Food 4 Less	1	2.0	Fleming Foods, Inc., Geneva, AL
United Supermarkets	1	1.0	Own, Pensacola, FL
OTHER GROCERY STORES (Including Independents and Convenience Stores)	na	2.0%	
TOTAL	71	100.0%	

na not available

MONTGOMERY - MSA

Autauga, Elmore, and Montgomery Counties	No. of Stores	% of Market Share*	Principal Supplier
GROCERY STORES:			
A&P	2		Own, Atlanta, GA
Big Bear/Super Foods	4		Hudson-Thompson, Montgomery, AL
Bruno's	2		Own, Birmingham, AL
Delchamps	3		Own, Mobile, AL
Food Fair	2		Own (Bruno's) Birmingham, AL
Family Mart	1		Own, Atlanta, GA
Food Maxx	1		Own, (Bruno's) Birmingham, AL
Food World	4		Own, Birmingham, AL
IGA	2		Graves Co., Demopolis, AL
Jr. Food Mart (C)	6		Own, Jackson, MS
Southern Pantry	6		na
Spectrum (C)	10		na
Winn Dixie	13		Own, Montgomery, AL
Zippy Mart (C)	11		na
OTHER GROCERY STORES	na		
TOTAL	67		

na not available
(C) Convenience stores
*Share of Market Data is unobtainable.
Note: Above information kindly provided by the MONTGOMERY ADVERTISER JOURNAL.

TUSCALOOSA - MSA

Tuscaloosa County	No. of Stores	% of Market Share*	Principal Supplier
LEADING STORES:			
A&P	1		Own, Atlanta, GA
Bruno's	1		Own, Birmingham, AL
Consumer Warehouse	2		Own, Birmingham, AL
Delchamp's	1		Own, Birmingham, AL
Food World	2		Own, Birmingham, AL
Kroger	2		Own, Memphis, TN
Winn Dixie	3		Own, Montgomery, AL
OTHER GROCERY STORES	na		
TOTAL	12		

na not available
* Share of Market Data is unobtainable.
Note: Above information confirmed by the TUSCALOOSA NEWS. According to this source Tuscaloosa has experienced no changes since last year.

ALASKA

ANCHORAGE – MSA

Anchorage Borough	No. of Stores*	% of Market Share**	Principal Supplier
GROCERY STORES:			
Carr's	9		J.B. Gottstein, & Co., Inc. Anchorage, AK
Foodland	3		J.B. Gottstein, & Co., Inc. Anchorage, AK
Prairie Market	2		J.B. Gottstein, & Co., Inc. Anchorage, AK
Proctor's	1		na
Safeway	6		Own, Bellevue, WA
OTHER GROCERY STORES	na		
TOTAL	21		

na not available
* In-house estimates.
**Share of Market Data is unobtainable.

ARIZONA

TUCSON – MSA

Pima County	No. of Stores	% of Market Share*	Principal Supplier
LEADING CHAINS:			
ABCO	21		Fleming Co. Inc., Phoenix, AZ
Circle-K	61		na
Fry's	10		Kroger Co., Phoenix, AZ
Q-Fresh	1		Fleming Co., Inc. Phoenix, AZ
Quik Mart (C)	25		na
Safeway	11		Own, Tempe, AZ
7-Eleven (C)/Lavicio	26		na
Smith's Food & Drug	5		na
Village Market	2		na
Warehouse Foods	5		na
TOTAL	167		

na not available
* Share of Market Data is unobtainable.
Note: Above information kindly provided by TNI Partners.

ARKANSAS

FAYETTEVILLE-SPRINGDALE - MSA

Washington County

FAYETTEVILLE

	No. of Stores	% of Market Share*	Principal Supplier
GROCERY STORES:			
Consumer's Discount Foods	1		Own, Springfield, MO
Consumer's IGA	4		Fleming Foods, Joplin, MO
Dillon's Thriftmart	2		Own, Springdale, AR
Food 4 Less	2		Own, Bentonville, AR
Harp's	1		Fleming Foods, Joplin, MO
7-Eleven (C)	2		na
Speedimart	6		na
Watson's	1		Hale Halsell Co., Tulsa, OK
OTHER GROCERY STORES	na		
TOTAL	19		

na not available
(C) Convenience Stores
* Share of Market Data is unobtainable.
Note: Above information kindly provided by the NORTHEAST ARKANSAS TIMES. According to this source, Fayetteville has experienced no changes since last year.

SPRINGDALE

GROCERY STORES:	*	**	
B&K	1		Assoc. Grocers, Springfield, MD
Consumer's	1		Own, Springfield, MO
Food 4 Less	1		Affiliated, Little Rock, AR
Harp's	2		Assoc. Grocers, Springfield, MD
IGA	1		na
Price Cutters	1		Fleming Foods, Joplin, MO
OTHER GROCERY STORES	na		
TOTAL	7		

na not available
* In-house estimates.
**Share of Market Data is unobtainable.

FORT SMITH-AR-OK - MSA

Crawford and Sebastian Counties, AR
Sequoyah County, OK

	No. of Stores*	% of Market Share**	Principal Supplier
GROCERY STORES:			
IGA Thriftway	1		Rand, Little Rock, AR
Kroger	3		Own, Little Rock, AR
Milgram's	6		na
Safeway	3		Own, Tulsa, OK
Winston's IGA	3		Affiliated, Little Rock, AR
OTHER GROCERY STORES	na		
TOTAL	16		

na not available
* In-house estimates.
**Share of Market Data is unobtainable.

LITTLE ROCK-NORTH LITTLE ROCK - MSA

Faulkner, Lonoke, Pulaski and Saline Counties

	No. of Stores*	% of Market Share**	Principal Supplier
LEADING CHAINS:			
Circle K	8		na
Food-4-Less	1		na
GSC	1		na
Harvest Foods	14		Own, Little Rock, AR
Harvest Foods Extra	4		na
IGA	10		Rands, Little Rock, AR
Independent	5		na
Kroger	9		Own, Little Rock, AR
Mega Market	2		na
Model Markets	4		na
Thriftway	4		na
OTHER GROCERY STORES			
7-Eleven	15		na
Majik Markets	12		na
TOTAL	89		

na not available
* In-house estimates.
**Share of Market Data is unobtainable.

PINE BLUFF – MSA

Jefferson County	No. of Stores	% of Market Share*	Principal Supplier
LEADING STORES:			
County Market	1		Lewis, Indianola, MS
Food King	1		Affiliated, Little Rock, AR
Harvest Food	4		Own, Little Rock, AR
IGA	4		Rand, Little Rock, AR
In & Out Convenience	34		na
Mad Butcher	1		Own, Pine Bluff, AR
Price Shocker	1		na
Sack and Save	1		McCarty-Holman, Jackson, MS
OTHER GROCERY STORES	na		
TOTAL	47		

na not available
* Share of Market Data is unobtainable.

CALIFORNIA

BAKERSFIELD – MSA

Kern County	No. of Stores	% of Market Share*	Principal Supplier
LEADING CHAINS:			
Albertson's	4		Own, Fullerton, CA
Alpha Beta	2		Own, La Habra, CA
Circle K (C)	17		A.M. Lewis, Northridge, CA
Jiffy	4		na
Lucky	5		na
Savemart (incl. Food 4-Less)	6		na
7-Eleven (C)	22		A.M. Lewis, Northridge, CA
Vons	13		Own, El Monte, CA
Youngs	3		Certified Grocers of CA, Los Angeles, CA
OTHER GROCERY STORES	na		
TOTAL	76		

na not available
(C) Convenience stores
* Share of Market Data is unobtainable.

CHICO – MSA

Butte County	No. of Stores	% of Market Share	Principal Supplier
GROCERY STORES:		89.0%	
Safeway	3	20.0	Own, San Francisco, CA
Food 4 Less	1	19.0	United Grocers, Sacramento, CA
Lucky	1	15.0	Own, Sacramento, CA
Albertson's	1	11.0	Own, Fullerton, CA
Raley's	1	10.0	United Grocers, Sacramento, CA
Holiday	2	9.0	Market Wholesale, Fresno, CA
OTHER GROCERY STORES	na	11.0%	
TOTAL	10	100.0%	

na not available

FRESNO – MSA

Fresno County	No. of Stores	% of Shopper Share	Principal Supplier
LEADING STORES:			
Save Mart	16	68.0	Fleming Foods, Modesto, CA
Vons	6	37.0	Various Suppliers
Pak-n-Save	1	13.0	Fleming Foods, San Francisco, CA
Costco	2	13.0	na
Safeway	4	11.0	Own, Freemont, CA
Food Maxx	2	**	Fleming Foods, Modesto, CA
Cost Less Foods	2	**	Certified Grocers of Calif., City of Commerce, CA
INDEPENDENTS	13		Various
TOTAL	46	*	

na not available
* Total does not equal 100% due to multiple numbers.
**New in the market when survey done.

MERCED - MSA

Merced County	No. of Stores	% of Market Share*	Principal Supplier
LEADING STORES:			
Lucky's	1		Own, San Leandro, CA
New Deal Markets	2		Market Wholesale, Modesto, CA
Save Mart	5		West Pac, Lathrop, CA
Raley's	1		West Pac, Lathrop, CA
OTHER GROCERY STORES:	na		
TOTAL	9		

na not available
* Share of Market Data is unobtainable.
Note: Above information kindly provided by Leshers Newspapers, Inc.

MODESTO - MSA

Stanislaus County	No. of Stores	% of Market Share	Principal Supplier
GROCERY STORES:		81.0%	
Save Mart	10	23.0	Fleming Foods of CA., Inc., Fremont, CA
Lucky	4	16.0	Own, San Leandro, CA
New Deal	9	15.0	Market Wholesale Grocery Co., Modesto, CA
Food 4 Less	2	11.0	Fleming Foods of CA., Inc., Fremont, CA
Raley's	3	10.0	Fleming Foods of CA, Inc., Sacramento, CA
Richland	5	5.0	Market Wholesale Grocery Co., Modesto, CA
Angelo's	1	1.0	Own, Sacramento, CA
Sav Mor	5	*	Market Wholesale Grocery Co., Modesto, CA
Sam's Food City	1	*	Market Wholesale Grocery Co., Modesto, CA
OTHER GROCERY STORES	na	19.0%	
TOTAL	40	100.0%	

na not available
* Included in "Other Grocery Stores" percent.
Note: Above information kindly provided by THE MODESTO BEE.

OXNARD-VENTURA - PMSA

Ventura County	No. of Stores	% of Market Share	Principal Supplier
LEADING CHAINS:		92.0%	
Von's	18	25.0	Own, Los Angeles, CA
Alpha Beta	4	22.0	Own, La Habra, CA
Lucky	6	18.0	Own, Sacramento, CA
Albertson's Grocery Warehouse	4	10.0	Fleming Foods, Fremont, CA
Ralph's	6	10.0	Own, Compton, CA
Hughes	4	7.0	Cert. Groc. of CA, Los Angeles, CA
Smith's Food & Drug	1	*	na
LEADING INDEPENDENTS:		1.0%	
Johnsons Farms	1	1.0	Cert. Groc. of CA, Los Angeles, CA
B & D Markets	1	*	Cert. Groc. of CA, Los Angeles, CA
B-Z Avenue Market	1	*	Cert. Groc. of CA, Los Angeles, CA
Bayless Market	1	*	Cert. Groc. of CA, Los Angeles, CA
Dahl's Market	1	*	Cert. Groc. of CA, Los Angeles, CA
Santa Cruz Ranch Markets	1	*	Cert. Groc. of CA, Los Angeles, CA
Jue's Market	1	*	Cert. Groc. of CA, Los Angeles, CA
Ken's Markets	1	*	Cert. Groc. of CA, Los Angeles, CA
Mercado La Plaza	1	*	Cert. Groc. of CA, Los Angeles, CA
Noren's	1	*	Cert. Groc. of CA, Los Angeles, CA
Tradewinds	1	*	Cert. Groc. of CA, Los Angeles, CA
LEADING CONVENIENCE STORES:			
7-Eleven	16	*	Own, San Francisco, CA
Stop N' Go	10	*	na
Circle K Stores	4	*	na
OTHER GROCERY STORES	na	7.0%	
TOTAL	84	100.0%	

na not available
* Included in "Other Grocery Stores" percent.

Note: Above information kindly provided by THE VENTURA COUNTY STAR-FREE PRESS, and another source who prefers to remain annonymous.

REDDING – MSA

Shasta County	No. of Stores	% of Market Share*	Principal Supplier
GROCERY STORES:		85.0%	
Safeway	3	26.0	Own, Sacramento, CA
Holiday	11	18.0	Market Wholesale, Fresco, CA
Albertson's	1	17.0	Fleming Foods, Freemont, CA
Raley's	2	13.0	United Grocers, Sacramento, CA
Food 4 Less	1	7.0	Fleming Foods, Freemont, CA
Food Connections	1	4.0	United Grocers, Portland, OR
OTHER GROCERY STORES	na	15.0%	
TOTAL	19	100.0%	

na not available
* Share of Market Data is estimated.

SALINAS–SEASIDE–MONTEREY – MSA

Monterey County	No. of Stores	SALINAS* % of Market Share**	Principal Supplier
LEADING CHAINS:			
Lucky Stores	3		Own, San Leandro, CA
Nob Hill	2		Fleming Foods, Fremont, CA
Quick Stop Market (C)	5		McLane, Merced, CA
Safeway Stores	3		Own, Oakland, CA
7-Eleven (C)	7		Southland Corp., Dallas, TX
LEADING INDEPENDENTS:			
Food Maxx	3		na
Monte Mart Grocery Warehouse	1		Albertson's, Boise, ID
Star Market	1		Market Wholesale, Modesto, CA
OTHER GROCERY STORES:			
Amigo Market	1		na
Asian Market	1		na
Broadway Market	1		na
C & C Market	1		na
California Market	1		na
Corner Market	1		na
Coral De Tierra Store	1		na
E Z Market	1		na
El Charrito Market	1		na
Express Mart (C)	1		na
Gin's Super Market	1		na
Glenn's General Store	1		na
Hong's Oriental Market	1		na
Hot Stop Food Store (C)	1		na
Mayfair Market	1		na
Mid Town Market	1		na
Moses Market	1		na
Oak Park Food Service	1		na
101 Mini Mart (C)	1		na
One Stop Market (C)	1		na
Palace Super Market	1		na
Pilipino Oriental Foods	1		na
Quality Market	1		na
Quik Mart	1		na
River Road Market	1		na
Ron's Market	1		na
Rodeo Grocery	1		na
Salinas	1		na
Sun Market	1		na
Tokyo Oriental Foods	1		na
Tony's Market	1		na
Village Market	1		na
Villa Lobos Market	2		na
TOTAL	59		

na not available (C) Convenience Stores

* Info. above also covers North County cities of Castroville and Unincorp., Prunedale.

**Share of Market Data unobtainable.

Note: Above information kindly provided by THE SALINAS CALIFORNIAN and another source who prefers to remain anonymous.

SALINAS–SEASIDE–MONTEREY – MSA (continued)

MONTEREY*

	No. of Stores	% of Market Share**	Principal Supplier
LEADING CHAINS:			
Albertson's	1		Own, Boise, ID
Lucky	3		Own, San Leandro, CA
Monte Mart–Grocery Warehouse	1		Own, Boise, ID
Nob Hill	1		Own, Gilroy, CA
Safeway	5		Own, Oakland, CA
INDEPENDENTS:			
Bi Rite Market	1		na
Bruno's Market	1		na
Carmel Valley Market	1		na
Grove Market	1		na
Hiway Liquor & Grocery	1		na
Indian Oriental	1		na
Kasey's	1		na
Lighthouse Produce	1		na
Monte Vista Market	1		na
Neilson Brothers Market	1		na
Seaside Market	1		na
Sunrise Market	1		na
Valnizzas Market	1		na
Valu Max	1		na
CONVENIENCE STORES:			
Corner Store No. 3	1		na
Quick Stop	1		na
7-Eleven	5		na
TOTAL	31		

na not available
* Information above also covers the cities of Carmel, Carmel Valley, Marina, Pacific Grove and Seaside.
**Share of Market Data is unobtainable.
Note: Above information kindly provided by the MONTEREY HERALD.

SANTA BARBARA-SANTA MARIA-LOMPOC - MSA

SANTA BARBARA

Santa Barbara County	No. of Stores	% of Market Share	Principal Supplier
LEADING STORES:			
Vons	6	58.0	Own, El Monte, CA
Lucky's	5	44.0	Own, Buena Park, CA
Alpha Beta	1	12.0	Own, La Habra, CA
Albertson's	1	11.0	Own, Brea, CA
Williams Bros.	1	5.0	na
Foodland	1	--	na
Santa Cruz	1	--	Certified Grocers, Los Angeles, CA
OTHER GROCERY STORES	6		
TOTAL	22		

na not available

SANTA MARIA

GROCERY STORES:			
William Bros.*	4	70.0	Certified Grocers, Los Angeles, CA
Lucky	3	48.0	Own, Buena Park, CA
Food 4 Less	1	31.0	Fleming Foods
OTHER GROCERY STORES	na		
TOTAL	8		

na not available
* Vons is negotiating with William Bros. to buy the chain.
Note: Above information kindly provided by the SANTA MARIA TIMES.

LOMPOC

GROCERY STORES:		*	
Commissary (Vanderberg Air Force Base)	1		Buy Direct
Lucky	1		Own, Buena Park, CA
Scolari's	1		na
William Bros.	3		Certified Grocers, Los Angeles, CA
OTHER GROCERY STORES:			
TOTAL	6		

na not available
* Share of Market Data is unobtainable.
Note: Above information kindly provided by the LOMPOC RECORD.

SANTA CRUZ – PMSA

Santa Cruz County	No. of Stores	% of Market Share*	Principal Supplier
GROCERY STORES:			
Albertson's	2		Own, San Leandro, CA
Deluxe	1		Own, Milpitas, CA
Deluxe of Apto's	1		Own, Milpitas, CA
Lucky	2		Own, Fremont, CA
Nob Hill	2		Own, Gilroy, CA
Safeway	6		Own, Fremont, CA
Shopper's Corner	1		na
Zanotto's	2		na
OTHER GROCERY STORES	na		
TOTAL	17		

na not available
* Share of Market Data is unobtainable.
Note: Above information kindly provided by THE SANTA CRUZ SENTINEL. According to this source Santa Cruz has experienced no changes since last year.

SANTA ROSA–PETALUMA – PMSA

Sonoma County	No. of Stores	% of Shoppers*	Principal Supplier
LEADING STORES:		87.0%	
Safeway	11	32.0	Own, Fremont, CA
Lucky	6	22.0	Own, San Leandro, CA
Food 4 Less	1	9.0	Fleming, Fremont, CA
Albertson's	4	8.0	Fleming, Fremont, CA
Raley's	2	8.0	Fleming, Sacramento, CA
G&G Super	1	3.0	na
Costco	1	2.0	na
Molsberry's	4	2.0	na
Petrini	1	1.0	Own, San Francisco, CA
OTHER GROCERY STORES	na	13.0%	
TOTAL	31	100.0%	

na not available
* Based on the following question: "At what one store did you buy most of the groceries you purchased in the past seven days?" 81% queried had done shopping in the past seven days.
Note: Above information kindly provided by THE SANTA ROSA PRESS DEMOCRAT.

STOCKTON – MSA

San Joaquin County	No. of Stores	% of Market Share*	Principal Supplier
LEADING CHAINS:			
Food Bank/Fry's	7		na
Food 4 Less	2		Fleming
Lucky Stores	2		na
Pak N Save	1		na
Safeway	2		Own, Sacramento, CA
Raley's	1		na
VOLUNTARY &/OR COOPERATIVE GROUPS:			
Big T Supermarkets	4		na
LEADING INDEPENDENTS:			
Big Value	1		United Grocers, Sacramento, CA
Centromart	9		Market Wholesale, Modesto, CA
Don Quick Stores	1		Own, Houston, TX
Giant Save	1		Market Whls., Modesto, CA
Podestos	1		na
Save Mart	2		United Grocers Ltd., Sacramento, CA
Segarinis	1		United Grocers Ltd., Sacramento, CA
LEADING CONVENIENCE STORE CHAINS:			
AM PM Mini Markets	24		na
Circle K	4		na
Quik Stop Markets	7		United Grocers Ltd., Sacramento, CA
7-Eleven	7		na
TOTAL	77		

na not available
* Share of Market Data is unobtainable.
Note: Above information kindly provided by THE STOCKTON RECORD.

VALLEJO–FAIRFIELD–NAPA – PMSA

Napa and Solano Counties	No. of Stores	% of Market Share*	Principal Supplier
GROCERY STORES:			
Albertson's	2		Fleming, Fremont, CA
Alpha Beta	1		Fleming, Milpitas, CA
Better Buy Foods	1		na
Food Fair	2		na
Food 4 Less	1		na
Fry's	1		Own, El Sabrante, CA
Lucky's	4		Own, San Leandro, CA
Nob Hill	1		na
Raley's	2		Market Wholesale, Napa, CA
Safeway	6		Own, Fremont, CA
Vallerga's	3		Market Wholesale, Napa, CA
OTHER GROCERY STORES	na		
TOTAL	25		

na not available * Share of Market Data is unobtainable.
Note: Above information kindly provided by VALLEJO TIMES-HERALD. According to our source, Fairfield experienced no changes since last year.

VISALIA–TULARE–PORTERVILLE – MSA

Tulare County	No. of Stores	% of Market Share*	Principal Supplier
GROCERY STORES:			
Best Buy Market	1		Nickel's Payless, Visalia, CA
Big C Market	1		na
Budget Foods	1		na
Fairway IGA	3		na
Food 4 Less	1		Junito Market, Inc., Sacramento, CA
Food King	2		na
Foodland Market	3		na
Lindsay Foods	1		na
Lucky	1		Own, San Leandro, CA
Northgate IGA	2		na
R & N Market	3		na
Save Mart	6		Certified Grocers, Los Angeles, CA
Smith's	1		na
Town & Country	1		na
Von's	1		Own, Los Angeles, CA
White's Super Market	2		na
Young's	3		Certified Grocers, Los Angeles, CA
INDEPENDENT:			
Big C's	1	na	
OTHER GROCERY STORES	na		
TOTAL	34		

na not available *Share of Market Data is unobtainable.
Note: Above information kindly provided by the TULARE ADVANCE-REGISTER and the PORTERVILLE RECORDER.

YUBA CITY - MARYSVILLE - MSA

Sutter and Yuba Counties	No. of Stores	% of Market Share	Principal Supplier
LEADING STORES:		40.0%	
Food 4 Less	1	25.0	Fleming, Fremont, CA
Raleys	1	20.0(e)	Fleming, Fremont, CA
Holiday Markets	2	*	Market Wholesale, Fresno, CA
Lucky Markets	2	*	Own, San Leandro, CA
Safeway	1	*	Own, Fremont, CA
INDEPENDENTS:			
Canned Food Warehouse	1	*	na
E-Z Stop Market	1	*	na
Kings Supermarket	1	*	na
Lim Hall's Family Market	1	*	na
Mike's Food Market	1	*	na
Mr. Paul's Market	1	*	na
Olivehurst Market	1	*	na
Park Grocery	1	*	na
Percy Avenue Grocery Store	1	*	na
Stop n'Save Market	1	*	na
Warren's Market	1	*	na
Wilbur Market	1	*	na
CONVENIENCE STORES:			
Circle K Store	1	*	na
Jack Pot Food Mart	1	*	na
Jiffy Food Store	3	*	na
7-Eleven	6	*	na
TOTAL	30	--	

na not available
(e) estimated
* Share of Market Data is unobtainable.
Note: Above information kindly provided by THE YUBA-SUTTER APPEAL-DEMOCRAT.

COLORADO

BOULDER-LONGMONT - PMSA

BOULDER

Boulder County	No. of Stores*	% of Market Share**	Principal Supplier
LEADING CHAINS:			
King Soopers	3		Own, Denver, CO
Safeway	2		Own, Denver, CO
Albertson's	1		McLane Western, Denver, CO
Colony IGA	1		na
OTHER GROCERY STORES	na		
TOTAL	7		

na not available
* In-house estimates.
**Share of Market Data is unobtainable.

LONGMONT

LEADING STORES:		*	
Albertson's	1		McLane Western, Denver, CO
Pantry Market	1		na
King Soopers	1		Own, Denver, CO
Safeway	3		Own, Denver, CO
Food Bonanza	1		na
OTHER GROCERY STORES	na		
TOTAL	7		

na not available
* Share of Market Data is unobtainable.
Note: According to our source, Longmont has experienced no changes since last year.

COLORADO SPRINGS - MSA

El Paso County	No. of Stores	% of Market Share*	Principal Supplier
LEADING CHAINS:			
Albertson's	5		Own, Denver, CO
King Soopers	8		Own, Denver, CO
Safeway	9		Own, Denver, CO
City Market	1		Own, Grand Junction, CO
LEADING CONVENIENCE STORE CHAINS:			
Circle K	6		McLane Western, Denver, CO
Kwik Way Stores	13		Super Valu, Denver, CO
Loaf 'n Jug	15		McLane Western, Denver, CO
7-Eleven	56		McLane Western, Denver, CO
LEADING INDEPENDENTS:			
Babe's Market	1		Super Valu, Denver, CO
Black Forest Stores	1		Super Valu, Denver, CO
Circle Super	1		City Market, Grand Junction, CO
City Supers	1		Super Valu, Denver, CO
Cubs	2		Super Valu, Denver, CO
Sax	1		Nash Finch, Denver, CO
Simms Super	1		Super Valu, Denver, CO
OTHER GROCERY STORES	na		
TOTAL	121		

na not available
* Share of Market Data is unobtainable.

FORT COLLINS–LOVELAND – MSA

Larimer County	No. of Stores	% of Market Share*	Principal Supplier
LEADING CHAINS:		99.0%	
King Soopers	3	29.0	Dillon, Denver, CO
Steele's	2	25.0	Nash Finch
Albertson's	2	21.0	Own, Aurora, CO
Safeway	4	13.0	Own, Denver, CO
Toddy's	1	8.0	Surefine, Kansas City, KS
Beavers	1	1.0	na
Overland Foods	1	1.0	na
7-Eleven	7	1.0	na
County Market	1	na	Lever Brothers/Super Valu
OTHER GROCERY STORES	na	1.0%	
TOTAL	22	100.0%	

na not available
Note: Above information kindly provided by THE FORT COLLINS COLORADOAN and THE LOVELAND DAILY REPORTER HERALD.
* Figures are for 1988.

GREELEY – MSA

Weld County	No. of Stores	% of Market Share*	Principal Supplier
LEADING CHAINS:			
Grocery Warehouse	1		Albertson's, Aurora, CO
King Soopers	1		Dillon, Denver, CO
Safeway	2		Own, Denver, CO
Food Bonanza	1		Nash Finch
Toddy's	1		Sure Fine
Albertson's	1		Albertson's
OTHER GROCERY STORES	na		
TOTAL	7		

na not available
* Share of Market Data is unobtainable.
Note: According to our source, Greeley has experienced no changes since last year.

PUEBLO – MSA

Pueblo County	No. of Stores*	% of Market Share**	Principal Supplier
GROCERY STORES:		87.0%	
King Soopers	2	35.0	Own, Denver, CO
County Market	1	29.0	Super Valu, Denver, CO
Safeway	3	23.0	Own, Denver, CO
Kwik Way (C)	3	*	Super Valu, Denver, CO
Loaf N Jug (C)	17	*	McLane Western, Denver, CO
7-Eleven (C)	9	*	McLane Western, Denver, CO
Stop N' Save	8	*	na
LEADING INDEPENDENTS		10.0%	
Chef's Food Centers	2	5.0	Super Valu, Denver, CO
So-Lo Discount	1	3.0	Super Value, Denver, CO
Super Foods	2	2.0	na
OTHER GROCERY STORES	na	3.0%	
TOTAL	48	100.0%	

na not available (C) Convenience Stores
Note: Above information kindly provided by the PUEBLO CHIEFTAIN.

CONNECTICUT

BRIDGEPORT–PMSA

Parts of Fairfield and New Haven Counties	No. of Stores	% of Market Share*	Principal Supplier
LEADING STORES:		77.7%	
Stop N Shop	12	19.5	Own, North Quincy, MA
Grand Union	14	12.3	Own, Elmwood Park, NJ
Waldbaums Food Marts	8	11.7	C&S Wholesale Grocery, Inc., Holyoke, MA
A&P	9	9.6	Own, Rockville Center, NY and Springfield, MA
Pathmark	4	9.4	Supermarkets Gen'l., Saddlebrook, NJ
Grade A	3	4.3	Allied Grocers Coop, Inc., Stamford, CT
Finast	6	4.0	First National Supermarkets, Windsor Locks, CT
Gran Central	9	3.9	Krasdale, Stamford, CT
Food Emporiums/A&P	2	3.0	A&P, Bronx, NY
OTHER GROCERY STORES	na	22.3%	
TOTAL	67	100.0%	

na not available
Note: According to our source, Bridgeport has experienced no changes since last year.

BRISTOL – PMSA

Parts of Hartford and Litchfield Counties	No. of Stores*	% of Market Share**	Principal Supplier
LEADING CHAINS:			
A&P	2		Own, Springfield, MA
Ferraro's	1		na
First National	1		na
Food Mart	2		Own, Holyoke, MA
IGA	1		Bozzuto's, Inc., Cheshire, CT
Shop Rite	1		Motta, East Harford, CT
Stop N Shop	1		Own, New Haven, CT
Waz's	1		na
OTHER GROCERY STORES	na		
TOTAL	10		

na not available * In-house estimates.
**Share of Market Data is unobtainable.

DANBURY – PMSA

Parts of Fairfield and Litchfield Counties	No. of Stores	% of Market Share*	Principal Supplier
LEADING CHAINS:			
A&P	2		Own, Springfield, MA
Ancora's IGA	1		Bozzuto's, Inc., Cheshire, CT
Bethel Food Market (IGA)	1		Bozzuto's, Inc., Cheshire, CT
C-Town	1		Own, Gaylordsville, CT
Deep's (IGA)	1		Allied, Windsor, CT
First National (Finast)	2		Own, Winsor Locks, CT
Grand Union	4		Own, Wayne, NJ
Hayday	1		Own, Westport, CT
Morey's (IGA)	1		Bozzuto's, Inc., Cheshire, CT
New Fairfield Food	1		Allied, Windsor, CT
Northville Valu	1		Allied, Windsop, CT
Pathmark	1		Supermarkets General, Saddlebrook, NJ
Shop Rite	1		Wakefern Food, Hartford, CT
Stew Leonard's	1		Own, Norwalk, CT
Stop N Shop	5		Own, North Quincy, MA
Waldbaums	2		Own, Holyoke, MA
OTHER GROCERY STORES	na		
TOTAL	26		

na not available
* Share of Market Data is unobtainable.

MIDDLETOWN - PMSA

Middlesex County	No. of Stores	% of Market Share	Principal Supplier
LEADING STORES:			
Stop & Shop	4	51.0	Own, North Haven, CT
Food Mart	3	28.0	na
Finast	2	10.0	First National, Windsor Locks, CT
Colonial IGA	1	6.0	na
Shop Rite	1	6.0	Own, East Hartford, CT
Town and Country	2	4.0	na
Tri Town	1	3.0	na
TOTAL	14	*	

na not available

* Percents exceed 100.0% due to rounding.

Note: According to our source, Middletown has experienced no changes since last year. Information presented covers all of Middlesex County, not exclusively Middletown. Please use figures cautiously.

NEW BRITAIN - PMSA

Parts of Hartford County, Berlintown, New Britain City, Plainville Town and Southington Town	No. of Stores	% of Market Share*	Principal Supplier
LEADING CHAINS:			
Finast/Edwards	2		na
Food Mart	2		Sweet Life Foods, Suffield, CT
Stop N Shop	1		Own, North Haven, CT
LEADING CONVENIENCE STORE CHAINS:			
Cumberland Farms	6		N. England Grocer Supply Co., Northboro, MA
7-Eleven	2		na
VOLUNTARY &/OR COOPERATIVE GROUPS:			
Bozzuto's			Own, Cheshire, CT
LEADING INDEPENDENTS:			
C-Town	1		na
Food Bag	5		na
Gnazzo's	2		na
Shop Rite	1		Own, East Hartford, CT
Waz's IGA	1		na
TOTAL	25		

na not available

* Share of Market Data is unobtainable.

NEW HAVEN-MERIDEN - MSA

NEW HAVEN

Parts of Middlesex and New Haven Counties

	No. of Stores	% of Market Share*	Principal Supplier
GROCERY STORES:			
Stop N Shop	14	72.0	Own, North Haven, CT
Waldbaum's Food Mart	5	23.0	Sweet Life Foods, Suffield, CT
Pathmark	3	18.0	Supermarkets General Corp., Saddlebrook, NJ
Edward's Warehouse Foods	1	13.0	Own, Windsor Locks, CT
First National	4	13.0	Own, Windsor Locks, CT
Everybody's Market	2	10.0	Sweet Life Foods, Hamden, CT
Klarides	2	8.0	
Gran Central	3	7.0	Krasdale, Stamford, CT
IGA	4	na	
OTHER GROCERY STORES	225	na	
TOTAL	263	**	

na not available

* Grocery stores shopped in past 7 days from Belden Continuing Market Study, 1989 (Duplicate responses allowed).

** Estimate, includes convenience stores

MERIDEN

LEADING CHAINS:		
Edwards Food Warehouse	1	Own, Burlington, MA
Everybody's	3	Own, Cheshire, CT
First National	2	Own, Windsor Locks, CT
Food Mart	2	Sweet Life Foods, Suffield, CT
Stop N Shop	3	Own, North Haven, CT
LEADING CONVENIENCE STORE CHAINS:		
Cumberland Farms	9	Own, Canton, MA
Dairy Mart	5	na
Dairy Farms	4	Own, Enfield, CT
Food Bag	7	Own, Kensington, CT
Wawa Foods	1	Own, Wawa, PA
Xtra Mart	2	na
VOLUNTARY &/OR COOPERATIVE GROUPS:		
Shop Rite	2	Own and Wakefern Food Corp., Elizabeth, NJ
LEADING INDEPENDENTS:		
Barker's Market	1	Sweet Life Foods, Suffield, CT
OTHER GROCERY STORES	na	
TOTAL	42	

na not available

* Share of Market Data is unobtainable.

Note: Above Meriden information kindly provided by THE MERIDEN RECORD-JOURNAL.

NEW LONDON–NORWICH (CT–RI) – MSA

Parts of New London and Windham Counties, CT – Part of Washington County, RI	No. of Stores	% of Market Share	Principal Supplier
GROCERY STORES:		88.6%	
Stop & Shop	5**/4*	36.3	Own, North Haven, CT
First National	3	10.7	Own, Windsor Locks, CT
Shop Rite	1	7.5	Wakefern Food Corp, Elizabeth, NJ
Waldbaum's	1	5.1	C&S Wholesale Grocers, Inc., Holyoke, MA
A&P	4/3	4.8	Own, Springfield, CT
IGA	4/3	2.8	Bozzuto's, Inc., Cheshire, CT
Bolt Bros.	4/1	1.4	Own, Norwich, CT
Better Val-U	3/1	na	Own, Norwich, CT
Michael's Market	3	na	Own, Danielson, CT
Price Rite	1	na	Wakefern, Food Corp., Elizabeth, NJ
OTHER GROCERY STORES	5/na	26.0%	
TOTAL	34/26		

na not available
*This information kindly provided by our New London source.
**This information kindly provided by our Norwich source.

NORWALK – PMSA

Part of Fairfield County	No. of Stores	% of Market Share*	Principal Supplier
LEADING CHAINS:			
Food Emporium	1		Own, Bronx, NY
Grand Union	1		Own, Mount Kisco, NY
Pathmark	1		Own, Woodbridge, NJ
Stew Leonard	1		na
Stop N Shop	1		Own, North Haven, CT
Village Market	1		na
Waldbaums	1		Own, Central Islip, NY
OTHER GROCERY STORES	19		na
TOTAL	26		

na not available
* In-house estimates
**Share of Market Data is unobtainable.

STAMFORD – PMSA

Part of Fairfield County	No. of Stores	% of Market Share*	Principal Supplier
GROCERY STORES:			
A&P	2		Own, Springfield, MA
Bongiorno's	1		na
inast	2		First National, Windsor Locks, CT
Grade A	2		Wakefern Corp., (Shop Rite), Stamford, CT
Gran Central	3		Krasdale, Stamford, CT
Grand Union	1		na
Palmer's	1		na
OTHER GROCERY STORES	na		
TOTAL	12		

na not available
*Share of Market Data is unobtainable.

WATERBURY – MSA

Parts of Litchfield and New Haven Counties	No. of Stores	% of Market Share*	Principal Supplier
GROCERY STORES:			
A&P	3		Own, Springfield, MA
Big Y	1		na
Country Grocer	1		na
Edward's	1		Own, Burlington, MA
Everybody's	3		Sweet Life Foods, Hamden, CT
First National	5		Own, Windsor Locks, CT
Four Corners	1		na
Grand Union	1		Own, Elmwood Park, NJ
LaBonne's	3		Bozzuto
Pathmark	1		Supermarkets Gen. Corp., Woodbridge, NJ
Pat's IGA	1		na
Price Buster	1		na
Shop Rite	2		Motts, East Hartford, CT
Food Bonanza	1		na
OTHER GROCERY STORES:			
Oliver's Market	1		na
Pat's Market Place	1		na
Town Plot Supermarket	1		na
Waldbaum's	1		na
Waz IGA	2		na
TOTAL	31		

na not available
*Share of Market Data is unobtainable.
Note: Above information kindly provided by the WATERBURY REPUBLICAN-AMERICAN.

DELAWARE

WILMINGTON (DE-NJ-MD) - PMSA

New Castle County, DE Salem County, NJ Cecil County, MD	No. of Stores	% of Market Share	Principal Supplier
LEADING STORES:		73.0%	
Acme	16	32.0	American Stores Co., Philadelphia, PA and Whippany, NJ
Pathmark	5	18.0	Supermarkets General Corp., Delran, NJ
Thriftway	10	17.0	Fleming Foods, Oaks, PA
Super Fresh	6	15.0	A&P, Florence, NJ
Shop Rite	2	3.0	Wakefern, Union, NJ
Santonis, Inc.	1	2.0	B. Green & Co., Inc., Baltimore, MD
Military	1	2.0	Buy Direct
Sav-A-Lot	2	1.0	Moran Stores, Inc., Bridgeport, NJ
INDEPENDENTS	13	23.0%	Various
OTHER GROCERY STORES	na	4.0%	
TOTAL	56	100.0%	

na not available

FLORIDA

BRADENTON - MSA

Manatee County	No. of Stores	% of Market Share*	Principal Supplier
LEADING STORES:			
Albertson's	2		Own, Orlando, FL
Food Lion	2		na
Foodway	3		Affiliated of Florida, Tampa, FL
Jewel Osco	1		na
Kash 'N Karry	5		Tampa Wholesale, Tampa, FL
Mr. C's Warehouse	1		na
Publix	6		Own, Lakeland, FL
Save-A-Lot	1		na
Winn Dixie	7		Own, Tampa, FL
OTHER GROCERY STORES	na		
TOTAL	28		

na not available
* Share of Market Data is unobtainable.
Note: Above information kindly provided by THE BRADENTON HERALD.

DAYTONA BEACH - MSA

Volusia County	No. of Stores	% of Market Share	Principal Supplier
LEADING CHAINS:		77.0%	
Publix	17	27.0	Own, Lakeland, FL
Winn Dixie	21	25.0	Own, Orlando, FL
Food Lion	7	16.0	na
Albertson's	2	4.0	Own, Orlando, FL
Goodings	1	2.0	Certified Grocers, Ocala, FL
Walmart	6	2.0	na
Pic N Save	5	1.0	Own, Jacksonville, FL
Sav-More	1	na	na
LEADING CONVENIENCE STORE CHAINS:		10.5%	
7-Eleven	31	4.0	Southland Corp., Orlando, FL
Handyway	34	3.0	Own, Ocala, FL
Jiffy	31	1.5	Own, Miami, FL
Majik	18	1.5	Own, Tampa, FL
Little General	11	0.5	Southland Corp., Orlando, FL
LEADING INDEPENDENTS:		10.5%	
John's Family Market	5		na
Metz	3		Certified Grocers, Tampa, FL
Pearson's (Certified)	3	10.5	Certified Grocers, Tampa, FL
Thriftway	3		Certified Grocers, Tampa, FL
Wiggins Bros.	2		Own, Lakeland, FL
OTHER GROCERY STORES	na	2.0%	
TOTAL	201	100.0%	

na not available

FORT MYERS-CAPE CORAL - MSA

Lee County	No. of Stores	% of Market Share*	Principal Supplier
LEADING STORES:			
Affiliated	4		Own, Tampa, FL
Albertson's	1		Own, Orlando, FL
Circle K (C)	44		na
Convenient Food Mart (C)	3		na
Kash 'N Karry	8		Own, Tampa, FL
Publix	11		Own, Jacksonville, FL
7-Eleven (C)	29		na
U Sav	3		B&B Cash Grocery Stores, Tampa, FL
Winn-Dixie	11		Own, Tampa, FL
OTHER GROCERY STORES	na		
TOTAL	114		

na not available (C) Convenience Stores * Share of Market Data is unobtainable.
Note: Above information kindly provided by FORT MYERS NEWS PRESS and Breeze Corporation.

FORT PIERCE – MSA

Martin and St. Lucie Counties	No. of Stores	% of Market Share*	Principal Supplier
GROCERY STORES:			
Albertson's	2		Super Food Services, Orlando, FL
A&P	1		Own, New Orleans, LA
Associated Grocers	4		Own, Miami, FL
Bob & Ed's	1		na
Great Valu	1		Assoc. Grocers, Miami, FL
Publix	10		Own, Miami, FL
Winn-Dixie	7		Own, Pompano Beach, FL
OTHER GROCERY STORES	na		
TOTAL	26		

na not available * Share of Market Data is unobtainable.
Note: Above information kindly provided by FORT PIERCE TRIBUNE.

FORT WALTON BEACH – MSA

Okaloosa County	No. of Stores	% of Market Share	Principal Supplier
LEADING CHAINS:			
Delchamps	5	54.0	Own, Montgomery, AL
Food World	2	48.0	Bruno's, Birmingham, AL
Winn Dixie	6	44.0	Own, Montgomery, AL
Albertson's	1	na	Own, Orlando, FL
LEADING INDEPENDENTS:			
IGA Foodliner	1		na
Kelley's IGA	3	38.0	na
Penn Max	2	11.0	na
LEADING CONVENIENCE STORE CHAINS:			
Circle K	14		na
Jr. Food Stores	6		na
Ritz	8		na
Tom Thumb	31		na
OTHER GROCERY STORES			
Enrico's Italian Market	1		na
Kelley's Deli & Market	1		na
Village Supermarket	1		na
TOTAL	82		

na not available
Note: Above information kindly provided by NORTHWEST FLORIDA DAILY NEWS.

GAINESVILLE – MSA

Alachua and Bradford Counties	No. of Stores	% of Market Share	Principal Supplier
GROCERY STORES:			
Winn Dixie	6	34.0	Own, Jacksonville, FL
Publix	6	33.0	Own, Lakeland, FL
Food Lion	2	13.0	Own, Jacksonville, FL
Kash & Karry	3	12.0	Own, Geneva, AL
Albertson's	1	8.0	Own, Jacksonville, FL
Pic 'N Sav	4	7.0	Own, Jacksonville, FL
Thriftway	1	na	Certified Grocers of Florida, Ocala, FL
OTHER GROCERY STORES	na	7.0	
TOTAL	23	*	

na not available
* Percents do not equal 100% due to multiple answers.
Note: Above information kindly provided by THE GAINESVILLE SUN.

JACKSONVILLE – MSA

Clay, Duval, Nassau and St. Johns Counties	No. of Stores	% of Market Share	Principal Supplier
NATIONAL CHAINS:		80.0%	
Winn Dixie	45	37.0	Own, Jacksonville, FL
Publix	23	22.0	Own, Jacksonville, FL
Food Lion	23	12.0	Own, Green Cove, FL
Albertson's	7	9.0	Own, Orlando, FL
OTHER CHAINS:		8.0%	
Pic N Save	20	4.0	Own, Jacksonville, FL
Sam's Wholesale	2	2.0	na
Affiliated of Florida (Foodway)	20	1.0	Own, Tampa, FL
Souds (IGA)	4	1.0	na
CONVENIENCE STORES		10.0%	
Huntley Jiffy (Includes Day-N-Nite)	144	3.0	Own, Ocala, FL
Lil' Champ	136	3.0	Own, Ocala, FL
Majik Markets	27	1.0	Own, Atlanta, FL
Seven Eleven	23	1.0	Own, Jacksonville, FL
Gate (Includes Kangaroo/Zippy Mart)	35	1.0	Own, Jacksonville, FL
COMMISSARIES	3	1.0%	
ALL OTHERS	--	1.0%	
TOTAL	512	100.0%	

Note: Above information kindly provided by the FLORIDA TIMES-UNION.

LAKELAND-WINTER HAVEN - MSA

Polk County	No. of Stores	% of Market Share*	Principal Supplier
GROCERY STORES:			
Albertson's	2		Super Food Service, Inc., Orlando, FL
Food Lion	4		na
Kash & Karry	6		Own, Tampa, FL
Minit Shop (C)	10		na
Publix	14		Own, Jacksonville, FL
Winn-Dixie	12		Own, Jacksonville, FL
OTHER GROCERY STORES	na		
TOTAL	48		

na not available (C) Convenience Stores
* Share of Market Data is unobtainable.
Note: Above information kindly provided by THE LAKELAND LEDGER.

MELBOURNE-TITUSVILLE-PALM BAY - MSA

Brevard County	No. of Stores*	% of Market Share**	Principal Supplier
GROCERY STORES:			
Albertson's	1		Own, Jacksonville, FL
Goodings	7		Affiliated of Florida, Maitland, FL
Mr. Grocer	14		na
Publix	13		Own, Lakeland, FL
Winn-Dixie	16		Own, Tampa, FL
CONVENIENCE STORES:			BUYING OFFICES:
Cumberland Farms	8		Own, Canton, MA
Jiffy	34		Huntley, Orange Park, FL
Lil General	3		na
Majik Market	29		Own, Brandon, FL
7-Eleven	27		Southland Corp., Orlando, FL
Super Rx	6		na
Shop & Go	7		na
Step Saver	5		na
Tenneco	7		na
Zippy Mart	16		Own, Rocky Mount, NC
OTHER GROCERY STORES	na		
TOTAL	193		

na not available *In-house estimates. **Share of Market Data is unobtainable.
Note: Information above covers only Melbourne. Information on Titusville & Palm Bay was unobtainable.

NAPLES – MSA

Collier County	No. of Stores	% of Market Share*	Principal Supplier
GROCERY STORES:			
Publix	8		Own, Lakeland, FL
Winn Dixie	7		Own, Orlando, FL
Woolley's	5		Malone & Hyde, Miami, FL
Kash N' Karry	1		Tampa Wholesale, Tampa, FL
OTHER GROCERY STORES	na		
TOTAL	21		

na not available
* Share of Market Data is unobtainable.
Note: Above information kindly provided by the NAPLES DAILY NEWS.

OCALA – MSA

Marion County	No. of Stores	% of Market Share*	Principal Supplier
LEADING STORES:			
Alaco	2		Certified Grocers, Ocala, FL
Food Lion	3		na
Forest Grocery	1		Certified Grocers, Ocala, FL
Goodings	1		Certified Grocers, Ocala, FL
Kash N' Karry	5		Own, Geneva, AL
Publix	4		Own, Lakeland, FL
Sav-Mor	1		Certified Grocers, Ocala, FL
Winn Dixie	9		Own, Jacksonville, FL
TOTAL	26		

na not available
* Share of Market Data is unobtainable.

PANAMA CITY - MSA

Bay County	No. of Stores	% of Market Share*	Principal Supplier
GROCERY STORES:			
Corosel	1		na
Country Market	2		IGA
Delchamps	2		na
Eagle	1		na
Food World	3		Bruno's Inc., Birmingham, AL
Piggy Wiggly	2		Fleming Foods, Geneva, AL
Sunshine	3		Higdon Grocery Co., Cairo, GA, & local vendors
Winn Dixie	6		Own, Montgomery, AL
TOTAL	20		

na not available
* Share of Market Data is unobtainable.
Note: According to our source, Panama City has experienced no changes since last year.

PENSACOLA - MSA

Escambia and Santa Rosa Counties	No. of Stores	% of Market Share*	Principal Supplier
LEADING STORES:			
A&P	3		Own, New Orleans, LA
Albertson's	2		Lewis-Bear, Pensicola, FL
Barnes	7		na
Delchamps	7		Own, Mobile, AL
Food Max	2		Own, Birmingham, AL
Food World	4		Own, Birmingham, AL
IGA	1		na
Piggly Wiggly	2		Fleming Foods, Geneva, AL
Sack and Save	1		Own, Jackson, MS
Winn Dixie	11		Own, Jacksonville, FL
OTHER GROCERY STORES	1		
TOTAL	41		

na not available
* Share of Market Data is unobtainable.
Note: Above information kindly provided by PENSACOLA NEWS JOURNAL. According to this source, Pensacola has experienced no changes since last year.

SARASOTA - MSA

Sarasota County	No. of Stores	% of Customers*	Principal Supplier
LEADING STORES:			
Publix	17	66.0	Own, Lakeland, FL
Winn Dixie	8	51.0	Own, Jacksonville, FL
Kash 'N Karry	10	42.0	Tampa Wholesale, Tampa, FL
Albertson's	2	28.0	Own, Miami, FL
Food Lion	2	na	na
Foodway	1	na	na
TOTAL	40	**	

na not available
* Based on the question: "Where have you shopped in the past 7 days?"
** % of Customers does not equal 100.0% due to multiple answers.

TALLAHASSEE - MSA

Gadsden and Leon Counties	No. of Stores	% of Market Share*	Principal Supplier
GROCERY STORES:			
Albertson's	2		Lewis Bear, Pensacola, FL
Food Lion	3		na
Harvey's	3		na
Jr. Food Stores	12		na
Majik Markets (C)	18		Own, Jacksonville, FL
Publix	6		Own, Lakeland, FL
Sing Stop N' Shop	11		Higdon Grocery, Quincy, FL
Winn Dixie	5		Own, Jacksonville, FL
OTHER GROCERY STORES	na		
TOTAL	60		

na not available
(C) Convenience Store
* Share of Market Data is unobtainable.

WEST PALM BEACH-BOCA RATON-DELRAY BEACH – MSA

Palm Beach County	No. of Stores	% of Market Share*	Principal Supplier
LEADING STORES:			
Albertson's	5		Super Food Service, Inc., Orlando, FL
Pantry Pride	7		Malone & Hyde Inc., Pompano Beach, FL
Publix	38		Own, North Miami, FL
Winn Dixie	39		na
Woolley's Emporium	1		na
Xtra	1		na
OTHER GROCERY STORES	na		
TOTAL	91		

na not available
* Share of Market Data is unobtainable.

GEORGIA

ALBANY – MSA

Dougherty and Lee Counties	No. of Stores	% of Market Share	Principal Supplier
GROCERY STORES:		91.0%	
Piggly Wiggly	5	32.0	Own, Vidalia, GA
Harvey's	5	24.0	na
Winn Dixie	3	21.0	Own, Atlanta, GA
Food Lion	2	8.0	na
Family Mart	1	3.0	A&P Inc., Charlotte, NC
Warehouse Foods	1	3.0	na
INDEPENDENTS:	18	5.0%	Various
OTHER GROCERY STORES	na		
Military Commissary	1	4.0%	na
TOTAL	36	100.0%	

na not available
Note: Above information kindly provided by THE ALBANY HERALD.

ATHENS - MSA

Clarke, Jackson, Madison and Oconee Counties	No. of Stores	% of Market Share*	Principal Supplier
GROCERY STORES:			
Bell's	7		na
BiLo	2		Own, Mauldin, SC
Food Lion	2		Own, Salisbury, NC
Food Source	1		na
Ingles	2		Own, Asheville, NC
Kroger	2		Own, Atlanta, GA
Piggly Wiggly	1		Own, Vidalia, GA
Winn Dixie	3		Own, Atlanta, GA
OTHER GROCERY STORES	na		
TOTAL	20		

na not available
* Share of Market Data is unobtainable.
Note: Above information kindly provided by THE ATHENS DAILY NEWS/BANNER-HERALD.

AUGUSTA (GA-SC) - MSA

Columbia, McDuffie, Burke and Richmond Counties-GA Aiken County-SC	No. of Stores	% of Market Share	Principal Supplier
LEADING CHAINS:		95.0%	
Kroger	6	27.0	Own, Atlanta, GA
Bilo	5	20.0	Own, Mauldin, SC
Food Lion	7	19.0	Own, Salisbury, NC
Winn Dixie	7	16.0	Own, Taylors, SC
Piggly Wiggly	1	9.0	Own, Charleston Heights, SC
Food Max	3	2.0	
LEADING INDEPENDENTS:		2.0%	
Gurley's	6	2.0	Own, Harlem, GA
LEADING CONVENIENCE STORES:			
K	na		
OTHER GROCERY STORES	14	5.0%	
TOTAL	51	100.0%	

na not available
Note: Above information kindly provided by THE AUGUSTA CHRONICLE/AUGUSTA HERALD.

COLUMBUS (GA-AL) - MSA

Chattahoochee and Muscogee Counties, GA Russell County, AL	No. of Stores	% of Market Share*	Principal Supplier
GROCERY STORES:			
A&P	3		A&P, Atlanta, GA
Arrington Super Foods	3		Hudson Thompson, Montgomery, AL
Birdsey Super Market	1		Carroll Newton, Ozark, AL
County Market	1		Super Valu, Anniston, AL
Delta Foods	1		Hudson Thompson, Montgomery, AL
Family Mart	1		A&P, Atlanta, GA
Fletcher's Big Town	1		Hudson Thompson, Montgomery, AL
Food Max	1		Bruno's, Burmingham, AL
Frank's Warehouse Foods	3		Higdon Grocery, Quincy, FL
Goolsby Foods	9		Super Valu, Anniston, AL
IGA	1		Higdon Grocery, Quincy, FL
Lewis Jones	3		Mitchell Grocery Co., FL
Majik Market	5		McLane Southeast, Athens, GA
Piggly Wiggly	10		Piggly Wiggly, Birmingham, AL
Rainbow Foods	1		Fleming Foods, Geneva, AL
Sing Food Stores	6		Adel Grocery, Adel, GA
South Star	1		Piggly Wiggly, Birmingham, AL
Starvin Marvin	4		McLane, Athens, GA
Winn Dixie	6		Winn Dixie, Montgomery, AL
TOTAL	61		

na not available
(C) Convenience Stores
* Share of Market Data is unobtainable.

MACON-WARNER ROBINS - MSA

Bibb, Houston, Jones and Peach Counties	No. of Stores	% of Market Share	Principal Supplier
LEADING STORES:		77.0%	
Piggly Wiggly	12	36.0	Own, Vidalia, GA
Kroger	5	26.0	Own, Atlanta, GA
Commissary (Robins Air Force Base)	1	6.0	Buy Direct, Warner Robins, GA
Winn-Dixie	1	5.0	Own, Atlanta, GA
Red & White (Neal's)	3	2.0	Timberlake Groc. Co., Macon, GA
Family Mart	1	1.0	A&P Co., Inc., Charlotte, NC
Food Fair	1	1.0	Various
Food Max (Bruno's)	2	*	Own, Vidalia, GA
OTHER GROCERY STORES	na	23.0%	
TOTAL	26	100.0%	

na not available
* Included in "Other Grocery Stores" percent.
Note: According to our source Warner-Robins has experienced no changes since last year. Above information kindly provided by MACON TELEGRAPH & NEWS and a source which prefers to remain anonymous.

SAVANNAH - MSA

Chatham and Effingham Counties	No. of Stores	% of Market Share	Principal Supplier
LEADING STORES:		94.0%	
Kroger/M & M Supermarket	13	52.8	Own, Atlanta, GA
Food Lion	4	21.1	Own, Salisbury, NC
Piggly Wiggly	8	20.1	Own, Charleston, SC
Red & White	1	na	Wetterau, Inc., Charleston, SC
Food Max*	1	na	na
Publix**	1	na	na
OTHER GROCERY STORES	na	4.2%	
TOTAL	28		

na not available
* Store due to open in August, 1991.
** Store due to open by December, 1991.
# Based on survey of grocery stores shopped most in 7 days.
Note: Above information kindly provided by THE SAVANNAH NEWS PRESS.

HAWAII

HONOLULU – MSA

Honolulu County	No. of Stores	% of Market Share	Principal Supplier
LEADING STORES:		97.3%	
Safeway	16	22.0	Own, Freemont, CA
Foodland	28	20.4	Fleming Foods, Honolulu, HI
Times	14	14.6	Own, Honolulu, HI
Star	9	9.6	Certified, Los Angeles, CA
KTA	4	5.0	Y. Hata & Co., Ltd., Hilo, HI
ABC Stores	52	4.1	na
Longs	21	3.9	na
7-Eleven (C)	58	3.5	Southland Corp., Pleasanton, CA
Holiday Mart	3	3.1	Certified, Los Angeles, CA
Sure Save	4	2.9	Y. Hata & Co., Ltd., Hilo, HI
Tamura	1	1.8	na
Big Save	6	1.4	Certified, Los Angeles, CA
Ookas	2	1.3	na
Food Fair	2	1.0	Y. Hata & Co., Ltd., Hilo, HI
Okimoto	2	0.8	na
Nagasako	1	0.7	na
Big Way	3	0.5	na
Pay 'n Save	12	0.5	na
Haleiwa	1	0.5	na
A&P	2	*	na
Gibson's	1	*	na
OTHER GROCERY STORES	9	2.7%	
Maraju Market	1	0.4	na
Marukai	1	0.4	na
TOTAL	253	100.0%	

na not available
(C) Convenience Store
* Included in "Other" percent.
Note: Above information kindly provided by Hawaii Newspaper Agency.

IDAHO

BOISE CITY – MSA

Ada County	No. of Stores	% of Market Share*	Principal Supplier
LEADING CHAINS:			
Albertson's	11		Own, Salt Lake City, UT
Circle K (C)	18		Own, Boise, ID
Fred Meyer	1		Own, Portland, OR
M & W	4		Assoc. Food Stores, Boise, ID
Maxx	1		na
Radley's	1		na
7-Eleven (C)	12		Southland Corp., Englewood, CO
Shavers	1		na
OTHER GROCERY STORES	na		
TOTAL	49		

na not available
(C) Convenience Stores
* Share of Market Data is unobtainable.

ILLINOIS

AURORA-ELGIN - PMSA

AURORA

Kane and Kendall Counties	No. of Stores	% of Market Share*	Principal Supplier
CHAIN SUPERMARKETS:			
Aldi	5		na
Amoco Food Shop	2		Southland Corp., Dallas, TX
Buy-Rite	2		Central Grocers, Franklin Park, IL
Convenient Food Mart	5		na
Cub Foods	1		na
Dominick's	5		Own, Northlake, IL
Eagle	9		Own, Rock Island, IL
Frank's Finer Foods	3		na
Jewel	7		Own, Melrose Park, IL
Omni	1		na
7-11	6		Southland Corp., Dallas, TX
Walt's	3		na
White Hen Pantry	15		Jewel Foods, Melrose Park, IL
OTHER GROCERY STORES	na		
TOTAL	64		

na not available
* Share of Market Data is unobtainable.
Note: Above information kindly provided by the AURORA BEACON-NEWS.

ELGIN

	*	**	
LEADING STORES:			
Butera	1		na
Dominicks	1		Own, Northlake, IL
Eagle Foods	4		Own, Rock Island, IL
Gromer's	1		na
Jewel	3		Own, Melrose Park, IL
7-Eleven	5		Southland Corp., Dallas, TX
OTHER GROCERY STORES	na		
TOTAL	15		

na not available
* In-house estimates.
**Share of Market Data is unobtainable.

BLOOMINGTON–NORMAL – MSA

McLean County	No. of Stores	% of Market Share*	Principal Supplier
LEADING CHAINS:			
Aldi Discount Foods	1		na
Eagle Foods	2		Own, Milan, IL
Jewel Food Stores	3		Own, Melrose Park, IL
Kroger	3		Own, Indianapolis, IN
Schnucks	1		Schnucks Markets Inc., St. Louis, MO
VOLUNTARY &/OR CO-OP GROUPS:			
Cub Foods	1		J.M. Jones, Champaign, IL
IGA	20		J.M. Jones, Champaign, IL
LEADING INDEPENDENTS:			
Diana Foods	1		Jewel Foods, Melrose Park, IL
OTHER GROCERY STORES	na		
TOTAL	32		

na not available * Share of Market Data is unobtainable.
Note: Above information provided by THE PANTAGRAPH.

CHAMPAIGN–URBANA–RANTOUL – MSA

Champaign County	No. of Stores	% of Market Share*	Principal Supplier
LEADING CHAINS:			
Eagle Foods	3		Own, Milan, IL
Jewel	3		Own, Melrose Park, IL
Schnucks Supermarkets	1		Own, St. Louis, MO
VOLUNTARY &/OR CO-OP GROUPS:			
Diana Foods	1		Scrivner of IL, East Peoria, IL
IGA	4		J.M. Jones, Champaign, IL
LEADING INDEPENDENTS:			
Casey's General Store	1		na
Colonial Pantry	4		Southland Corp., Champaign, IL
Convenient Food Mart (C)	2		Southland Corp., Champaign, IL
County Market	2		J.M. Jones, Champaign, IL
Kwik Stop (C)	2		Southland Corp., Champaign, IL
White Hen Pantry	5		Scrivner of IL, East Peoria, IL
OTHER GROCERY STORES	7		
TOTAL	35		

* Share of Market Data is unobtainable. (C) Convenience Stores
Note: Information above covers only the Champaign and Urbana markets.
Rantoul market information is unobtainable.

DAVENPORT–ROCK ISLAND–MOLINE (IA–IL) – MSA

Rock Island County and Scott County, IA	No. of Stores	% of Market Share	Principal Supplier
LEADING CHAINS:		93.4%	
Eagle	12	43.5	Lucky Stores (MW Divs.), Milan, IL
Hy-Vee	6	28.4	Own, Charlton, IA
Jewel	5	14.5	Own, Chicago, IL
Aldi Discount Foods	4	3.0	Own, Chicago, IL
Econo Foods	1	2.0	Nash Finch, Des Moines, IA
Food 4 Less	1	1.0	Scrivner of IL, Peoria, IL
Jovan Foods	1	1.0	na
VOLUNTARY &/OR CO-OP GROUPS:		3.2%	
Royal Blue	4	1.5	na
Jack & Jill Stores	3	1.2	Nash Finch, Cedar Rapids, IL
Super Valu Stores	1	0.5	Own, Des Moines, IA
LEADING INDEPENDENTS:		3.0%	
Kwik Shop (C)	24	2.0	na
Convenient Stores (C)	9	1.0	na
OTHER GROCERY STORES	10	0.9%	
TOTAL	81	100.0%	

na not available
(C) Convenience Stores
Note: Above information kindly provided by THE MOLINE DISPATCH/THE ROCK ISLAND ARGUS.

DECATUR – MSA

Macon County	No. of Stores	% of Market Share	Principal Supplier
LEADING STORES:		100.0%	
Kroger	3	23.0	Own, St. Louis, MO
Eagle	3	21.0	Own, Milan, IL
Jewel	2	20.0	Own, Champaign, IL
Cub Foods	1	19.0	J.M. Jones, Champaign, IL
Aldi	1	16.0	
Kennedy's	2	1.0	J.M. Jones, Champaign, IL
OTHER GROCERY STORES	na	na	
TOTAL	12	100.0%	

na not available
Note: Above information kindly provided by DECATUR HERALD & REVIEW.

JOLIET – PMSA

Grundy and Will Counties	No. of Stores	% of Market Share	Principal Supplier
LEADING CHAINS:		86.2%	
Jewel Foods	5	24.3	Own, Melrose Park, IL
Cub	1	22.7	J.M. Jones, Champaigne, IL
Dominick	1	20.8	Own, Northlake, IL
Eagle	4	13.3	Own, Milan, IL
Aldi Discount Foods	1	5.1	Own Batavia, IL
LEADING INDEPENDENTS:		8.3%	
Certified	2	8.3	na
Economy	2	*	na
Hansen's Red Fox	1	*	Scrivner of IL, East Peoria, IL
Mitchells	1	*	na
Parks Bros.	1	*	na
OTHER GROCERY STORES	2	5.5%	
TOTAL	21	100.0%	

na not available
* Included in "Other Grocery Stores" percent.
Note: According to our source, Joliet has experienced no changes since last year.
Above information kindly provided by JOLIET HERALD NEWS.

KANKAKEE – MSA

Kankakee County	No. of Stores	% of Market Share	Principal Supplier
GROCERY STORES:		78.0%	
Jewel	2	28.0	Own, Melrose Park, IL
Eagle	2	21.0	Own, Milan, IL
Kroger	2	11.0	Own, St. Louis, MO
Food Festival	1	11.0	na
Food Expo	2	7.0	na
OTHER GROCERY STORES	na	22.0%	
TOTAL	9	100.0%	

na not available

LAKE COUNTY – PMSA

Lake County	No. of Stores*	% of Market Share**	Principal Supplier
LEADING CHAINS:			
Jewel Foods	15		Own, Melrose Park, IL
Eagle Foods	6		Own, Rock Island, IL
Dominick's Finer Foods	4		Own, Northlake, IL
Aldi Foods	3		Own, Batavia, IL
Piggly Wiggly/Sav U	2		Schultz, Sheboygan, WI
Cub Foods	2		SuperValue, Minneapolis, MN
Military	2		Buy Direct
Country Market	1		SuperValue, Minneapolis, MN
Omni Superstores	1		Dominick's, Northlake, IL
Treasure Island	1		Own, Chicago, IL
OTHER GROCERY STORES	62 (est.)		
TOTAL	99		

na not available
* In-house estimates.
** Share of Market Data is unobtainable.

PEORIA – MSA

Peoria, Tazewell and Woodford Counties	No. of Stores	% of Retail Food Volume	Principal Supplier
LEADING CHAINS:		94.5%	
Kroger	11	28.0	Own, Indianapolis & Peoria, IL
Red Fox	20	14.0	Scrivner of IL, E. Peoria, IL
Thompson Food Basket	10	13.0	Scrivner of IL, E. Peoria, IL
Eagle Food Centers L.P.	5	12.0	Lucky, Rock Island, IL
IGA:	8	9.0	
Ben Schwartz	3	4.0	J.M. Jones Co., Peoria, IL
All Others	5	5.0	J.M. Jones Co., Peoria, IL
Mr. K's	2	5.0	Scrivner of IL, E. Peoria, IL
Aldi	5	4.0	Own, Batavia, IL
County Market	1	4.0	J.M. Jones Co., Peoria, IL
Randall's	1	3.5	J.M. Jones Co., Peoria, IL
Martin's	1	3.0	Scrivner of IL, E. Peoria, IL
Lowell's Discount Foods	2	2.0	Own, Indianapolis, IN
CONVENIENCE STORES	na	5.5%	Various
TOTAL	65	100.0%	

na not available
Note: Above information kindly provided by the PEORIA JOURNAL STAR.

ROCKFORD – MSA

Boone and Winnebago County	No. of Stores*	% of Market Share**	Principal Supplier
LEADING STORES:			
Logli	4		Centrella, Chicago, IL
Cub Foods	1		Own, Madison, WI
Eagle	5		Own, Milan, IL
Hilander	4		Certified-Midwest, Chicago, IL
Magna	1		Jewel Foods, Melrose Park, IL
Pacemaker	4		Centrella, Chicago, IL
Aldi Discount Foods	2		Own, Batavia, IL
IGA	13		M. Loeb & Co., Elk Grove, IL
OTHER GROCERY STORES	na		
TOTAL	34		

na not available
* In-house estimates.
**Share of Market Data is unobtainable.

SPRINGFIELD – MSA

Menard and Sangamon County	No. of Stores	% of Market Share	Principal Supplier
LEADING STORES:		95.1%	
Shop 'N Save	3	24.7	Wetterau Foods, St. Louis, MO
Jewel	4	21.8	Own, Melrose Park, IL
National Food Store	2	14.2	Own, Rosemont, IL
Cub	1	12.0	J.M. Jones Co., Champaign, IL
Eagle	3	10.4	Own, Rock Island, IL
IGA	3	9.4	Wetterau Foods, St. Louis, MO
OTHER GROCERY STORES	na	7.5%	
TOTAL	18	100.0%	

na not available
Note: According to our source, Springfield has experienced no changes since last year.

INDIANA

ANDERSON – MSA

Madison County	No. of Stores*	% of Market Share**	Principal Supplier
GROCERY STORES:			
Payless	5		Scot Lad, Lansing, IL
Marsh Supermarkets	3		Own, Yorktown, IN
Harvest Market	3		McMahon-Lieb Co., Anderson, IN
OTHER GROCERY STORES	na		
TOTAL	11		

na not available
* In-house estimates.
**Share of Market Data is unobtainable.

BLOOMINGTON – MSA

Monroe County	No. of Stores	% of Market Share*	Principal Supplier
GROCERY STORES:			
IGA	3		Wetterau Foods, Bloomington, IN
Mr. D's	1		Wetterau Foods, Bloomington, IL
Kroger	2		Own, Indianapolis, IN
Safeway	1		Allied Grocers of IN, Indianapolis, IN
Marsh-Foodliner	2		Corporate Office, Indianapolis, IN
Village Pantry	5		Marsh Super Markets, Inc., Yorktown, IN
OTHER GROCERY STORES	na		
TOTAL	14		

na not available
* Share of Market Data is unobtainable.
Note: Above information kindly provided by THE BLOOMINGTON HERALD-TIMES.

ELKHART–GOSHEN – MSA

Elkhart County	No. of Stores	% of Market Share*	Principal Supplier
LEADING STORES:			
Aldi's	3		Spartan, Grand Rapids, MI
Augsburger	3		Super Valu, Champaign, IL
Everett's	1		Scot Lad, Lansing, IL
Family Fare	4		Spartan, Grand Rapids, MI
Felpausch	2		Spartan, Hastings, MI
Hardings	2		Spartan, Grand Rapids, MI
Kroger's	7		Own, Indianapolis, IN
Martin's	8		Scot Lad, Lansing, IL
Maurek's IGA	1		Wetterau Foods, Bloomington, IL
T & L Supermarkets	1		Super Food Services, Bellefontaine, OH
W.W. Wilt's	1		Food Marketing, Ft. Wayne, IN
OTHER GROCERY STORES	na		
TOTAL	33		

na not available
* Share of Market Data is unobtainable.
Note: Above information kindly provided by THE GOSHEN NEWS and THE ELKHART TRUTH.

EVANSVILLE (IN–KY) – MSA

Posey, Vanderburgh and Warrick Counties, IN Henderson County, KY	No. of Stores	% of Market Share	Principal Supplier
GROCERY STORES:			
Great Scot	4	31.0	Scot Lad, Lansing, IL
Schnucks	3	25.0	Own, St. Louis, MO
Buehler Buylow	2*	24.0	Scot Lad, Lansing, IL
Wesselman's	9	19.0	J.Winkler & Sons, Dale, IN
IGA	2	7.0	Scot Lad, Lansing IL
Royal	1	4.0	J. Winkler & Sons, Dale, IN
Simpson's	1	3.0	na
Jerry's	4	3.0	na
OTHER GROCERY STORES	na		
TOTAL	26	**	

na not available
* New store opening in September, 1991.
**Market Share does not equal 100% due to multiple answers.
Note: Above information kindly provided by Evansville Courier Company.

FORT WAYNE - MSA

Allen, De Kalb and Whitley Counties	No. of Stores	% of Market Share*	Principal Supplier
GROCERY STORES:			
Burger Dairy	5		na
Cub	1		Food Marketing, Fort Wayne, IN
Didier Bros.	3		na
Kroger	6		Own, Ft. Wayne, IN
Lynn's	3		Food Marketing, Fort Wayne, IN
Pio	2		na
Rogers	10		Food Marketing, Fort Wayne, IN
Scotts	12		Scot Lad, Inc., Lima, OH
Tom's	2		Food Marketing, Fort Wayne, IN
White Swan	2		Food Marketing, Fort Wayne, IN
OTHER GROCERY STORES	na		
TOTAL	46		

na not available
* Share of Market Data is unobtainable.

GARY-HAMMOND - PMSA

Lake and Porter Counties	No. of Stores	% of Market Share	Principal Supplier
LEADING STORES:		92.7%	
Strack & Van Til	4	22.8	Central Groc. Coop. Inc., Highland, IN
Jewel	5	19.1	Own, Melrose Park, IL
Stark's	12	15.3	Certified Groc. Midwest Inc., Calumet City, IL
Ultra	1	14.4	Central Groc. Coop. Inc., Highland,IN
Key Market	3	5.8	Central Groc. Coop. Inc., Highland,IN
Dominick's	3	5.1	Central Groc. Coop. Inc., Highland, IN
Cub	1	4.0	Central Groc., Coop. Inc. Highland, IN
Wiseway	1	3.5	na
Reliable	1	2.7	na
OTHER	na	7.3%	
TOTAL	31	100.0%	

na not available
Source: The MUNSTER TIMES Market Survey Dept., May 1991

INDIANAPOLIS, INDIANA – MSA

Boone, Hamilton, Hancock, Hendricks, Johnson, Marion, Morgan and Shelby Counties

	No. of Stores	% of Market Share**	Principal Supplier
LEADING CHAINS:			
Kroger	47	53.1%	Own, Indianapolis, IN
Marsh Supermarkets	35	44.8	Own, Indianapolis, IN
Cub Foods	4	28.0	Food Marketing Co., Indianapolis, IN
Safeway Food Stores	19	16.0	Malone & Hyde, Lexington, KY
O'Malia Food Markets	9	11.9	Scot Lad Foods, Noblesville, IN
Aldi Inc.	9	10.9	Own, Batavia, IL
IGA*	40	10.3	Wetterau, Bloomington, IN
Village Pantry*	85	8.1	Own, Indianapolis, IN
Mr. D's	5	6.0	Wetterau, Bloomington, IN
7-Eleven	6	5.1	Grocers Supply Co., Indianpolis, IN
Military	1	na	Buy Direct
ANY OTHER CONVENIENCE STORE	na	8.7	
OTHER GROCERY STORES	na	14.5	
TOTAL	260		

na not available * In-house estimates of number of stores.
**Market share is based on percent who shopped at a specified food store in the past week. Due to multiple responses, percentages do not total 100%.
Note: According to our source Indianapolis has experienced no changes since last year.

KOKOMO – MSA

Howard and Tipton Counties

	No. of Stores	% of Market Share*	Principal Supplier
LEADING STORES:			
County Market	1		Food Marketing, Ft. Wayne, IN
Kroger	3		Own, Indianapolis, IN
Marsh Food Liner	2		Own, Indianapolis, IN
Wallman's	2		Independent
OTHER GROCERY STORES	na		
TOTAL	8		

na not available * Share of Market Data is unobtainable.
Note: Above information kindly provided by THE KOKOMO TRIBUNE.

LAFAYETTE-WEST LAFAYETTE – MSA

Tippecanoe County	No. of Stores	% of Market Share*	Principal Supplier
GROCERY STORES:			
Jewel	3		Own, Chicago, IL
Marsh Food Liner	2		Own, Indianapolis, IN
Payless	4		Own, Anderson, IN
Smitty's Supermarket	2		Scot Lad, Lima, OH
OTHER GROCERY STORES	na		
TOTAL	11		

na not available
* Share of Market Data is unobtainable.
Note: Above information kindly provided by THE JOURNAL AND COURIER.

MUNCIE – MSA

Delaware County	No. of Stores	% of Market Share*	Principal Supplier
GROCERY STORES:			
A.L. Ross	4		Food Marketing, Ft. Wayne, IN
Eavey	1		Certified Grocers, Indianapolis, IN
Marsh	5		Own, Yorktown, IN
Wise	2		White Villa Foods, Dayton, OH
OTHER GROCERY STORES	na		
TOTAL	12		

na not available
* Share of Market Data is unobtainable.
Note: Above information kindly provided by MUNCIE STAR/PRESS.

SOUTH BEND–MISHAWAKA – MSA

St. Joseph County	No. of Stores	% of Market Share	Principal Supplier
GROCERY STORES:		92.8%	
Martin's	8	37.7	Own, South Bend, IN
Kroger	6	29.1	Own, Indianapolis, IN
Park N' Shop	2	6.7	Certified Grocers of Illinois, Chicago, IL
County Market	2	6.2	Food Marketing, Ft. Wayne, IN
Aldi's	2	5.8	na
Cira's	2	5.0	Food Marketing, Ft. Wayne, IN
Eagle's	1	2.3	na
Wilts	1	*	Food Marketing, Ft. Wayne, IN
OTHER GROCERY STORES	na	7.2%	
TOTAL	24		

na not available
* Included in "Other Grocery Stores" percent.
Note: Above information kindly provided by THE SOUTH BEND TRIBUNE.

TERRE HAUTE – MSA

Clay and Vigo Counties	No. of Stores	% of Market Share	Principal Supplier
LEADING CHAINS:		84.0%	
Kroger	4	44.0	Own, Indianapolis, IN
County Market	1	32.0	Super Valu, Champaign, IL
Page's Sak N' Save	2	6.0	Own, Terre Haute, IN
Lowell's	1	2.0	Safeway, Indianapolis, IN
VOLUNTARY &/OR CO-OP GROUPS:		1.0%	
IGA	1	1.0	Wetterau Foods, Bloomington, IL
OTHER GROCERY STORES	3	15.0%	
TOTAL	12	100.0%	

na not available
Note: Above information kindly provided by the TERRE HAUTE TRIBUNE-STAR.

IOWA

CEDAR RAPIDS - MSA

Linn County	No. of Stores	% of Market Share*	Principal Supplier
LEADING CHAINS:			
Hy-Vee	7	68.0	Own, Charlton, IA
Econo Foods	2	34.0	Nash Finch Co., Cedar Rapids, IA
Sun Mart	4	18.0	na
VOLUNTARY &/OR CO-OP GROUPS:			
Randall's	2	19.0	Super Valu, Des Moines, IA
OTHER GROCERY STORES	46		
TOTAL	61	**	

na not available
* Based on 1991 Consumer Market Study, Market Opinion Record.
**Numbers do not total 100% due to multiple answers.
Note: Above information kindly provided by THE CEDAR RAPIDS GAZETTE.

DES MOINES - MSA

Dallas, Polk and Warren Counties	No. of Stores	% of Market Share**	Principal Supplier
LEADING CHAINS:			
Aldi	3		na
Hy-Vee	12		Own and Charlton Whls., Charlton, IA
Dahl's Food Stores	10		Super Valu, Des Moines, IA
VOLUNTARY &/OR CO-OP GROUPS:			
Fareway	2		na
Food 4 Less	3		Erickson Petroleum Co., Minneapolis, MN
Sav U More	1		Own, Charlton, IA
Superamerica	2		na
Super Valu	7		Own, Des Moines, IA
OTHER GROCERY STORES	22		
TOTAL	62		

na not available
* In-house estimates.
**Share of Market Data is unobtainable.

DUBUQUE - MSA

Dubuque County	No. of Stores	% of Market Share*	Principal Supplier
GROCERY STORES:			
Aldi	1		Aldi Inc., West Burlington, IA
Eagle	3		Own, Milan, IL
Econo Foods	1		Nash Finch Co., Cedar Rapids, IA
Hy Vee	1		Own, Chariton, IA
Oky Doky	8		na
OTHER GROCERY STORES	na		
TOTAL	14		

na not available
* Share of Market Data is unobtainable.
According to our source, Dubuque has experienced no changes since last year.

IOWA CITY - MSA

Johnson County	No. of Stores	% of Market Share*	Principal Supplier
LEADING CHAINS:			
Eagle	3		Own, Milan, IA
Econo Foods	1		Nash Finch Co., Cedar Rapids, IA
Hy-Vee	4		Own, Chariton, IA
Randall's Super Value	2		Super Valu, Des Moines, IA
OTHER GROCERY STORES			
Holiday Foods	1		AGI, Ankeny, IA
TOTAL	11		

na not available
* Share of Market Data is unobtainable.
Note: According to our source, Iowa City has experienced no changes since last year.

SIOUX CITY (IA–NE) – MSA

Woodbury County, IA; Dakota County, NE	No. of Stores	% of Market Share*	Principal Supplier
LEADING CHAINS:			
Econofoods	1		Nash Finch, Minneapolis, MN
Fareway	2		Own, Boone, IA
Hy-Vee	3		Gateway, Sioux City, IA
IGA	4		na
Sunshine Food	4		Super Valu Stores, Inc., Des Moines, IA
OTHER GROCERY STORES	na		
TOTAL	14		

na not available
* Share of Market Data is unobtainable.

WATERLOO–CEDAR FALLS – MSA

Black Hawk and Bremer Counties	No. of Stores	% of Market Share	Principal Supplier
LEADING CHAINS:		78.0%	
Hy-Vee	5	39.0	Own, Charlton, IA
County Market	2	28.0	Own, Des Moines, IA
Food 4 Less	1	10.0	Own, Laurens, IA
Aldi Discount Foods	2	1.0	Own, Chicago, IL
VOLUNTARY &/OR CO-OP GROUPS:		11.0%	
Warehouse Mart	1	6.0	Nash Finch, Cedar Rapids, IA
Fleagle	3	5.0	Nash Finch, Cedar Rapids, IA
LEADING INDEPENDENTS:		6.0%	
Kimball Ridge	1	3.0	Assoc. Grocers, Ankeny, IA
S & S Markets	2	1.0	Assoc. Grocers, Ankeny, IA
Adams Store	1	1.0	Assoc. Grocers, Ankeny, IA
Midtown	1	1.0	na
OTHER GROCERY STORES	55	5.0%	
TOTAL	74	100.0%	

na not available
Note: According to our source, Waterloo-Cedar Falls has experienced no changes since last year.

KANSAS

LAWRENCE – MSA

Douglas County	No. of Stores	% of Market Share*	Principal Supplier
GROCERY STORES:			
Aldi	1		Own, Wright City, MO
Alvin's IGA	1		Fleming, Topeka, KS
Checker's	1		Fleming, Topeka, KS
Dillon's	3		Own, Hutchinson, KS
Food Barn	1		Safeway, Kansas City, MO
Food 4 Less	1		Assoc. Whls. Groc., Kansas City, KS
OTHER GROCERY STORES	na		
TOTAL	8		

na not available

* Share of Market Data is unobtainable.

Note: Above information kindly provided by LAWRENCE JOURNAL-WORLD. According to this source, Lawrence has experienced no changes since last year.

TOPEKA – MSA

Shawnee County	No. of Stores*	% of Market Share**	Principal Supplier
LEADING CHAINS:			
Dillon's	4		Own, Hutchinson, KS
Falley's	3		Asso. Whls. Grocers, Kansas City, KS
Food Barn	1		Safeway, Kansas City, MO
Food 4 Less	4		Fleming Co., North Kansas City, MO
Hypermart	1		na
Safeway	1		Own, Kansas City, MO
Super Saver	2		na
Tilton's	2		na
VOLUNTARY &/OR CO-OP GROUPS:			
IGA	3		Fleming Foods, Topeka, KS
Thriftway	3		Asso. Whls. Grocers, Kansas City, KS
LEADING INDEPENDENTS:			
Eakes	1		na
Harry's IGA	7		na
Herman's Beef & Sausage	1		na
JM Bauersfeld	2		na
Pauline Food Center	1		na
OTHER GROCERY STORES	26		
TOTAL	62		

na not available
* In-house estimates.
**Share of Market Data is unobtainable.
Note: According to our source, Topeka has experienced no changes since last year.

WICHITA - MSA

Butler, Harvey and Sedgwick Counties	No. of Stores	% of Market Share	Principal Supplier
LEADING STORES:		82.0%	
Dillon's	18	51.0	Kroger, Hutchinson, KS
Food Barn	9	13.0	Own, Kansas City, MO
Albertson's	4	9.0	Own
Food-4-Less	4	9.0	na
OTHER GROCERY STORES	na	18.0%	
TOTAL	35	100.0%	

na not available
Note: Above information kindly provided by THE WICHITA EAGLE.

KENTUCKY

LEXINGTON-FAYETTE - MSA

Bourbon, Clark, Fayette, Jessamine, Scott and Woodford Counties, KY	No. of Stores	% of Market Share*	Principal Supplier
LEADING STORES:			
Bestway	1		Malone & Hyde, Inc., Nicholasville, KY
Buy Low	2		na
Convenient (C)	26		Own, Louisville, KY**
County Market	1		Super Valu, Xenia, OH
Foodland	1		na
Foodtown	6		Affiliated Foods, Lexington, KY
Kroger	9		Own, Louisville, KY
Megamarket	1		Malone & Hyde, Inc., Nicholasville, KY
Mini Mart (C)	6		Own, Bowling Green, KY**
PDQ	2		na
Pic-Pac (C)	1		Malone & Hyde, Inc., Nicholasville, KY
Save-A-Lot	1		na
Randall's	6		Super Valu, Xenia, OH
Winn Dixie	5		Own, Louisville, KY
OTHER GROCERY STORES	na		
TOTAL	68		

na not available
(C) Convenient Stores
* Share of Market Data is unobtainable.
**These are locations of buying offices.

Note: Information above covers Lexington market only; Fayette market information is unobtainable. Above information kindly provided by THE LEXINGTON HERALD-LEADER.

LOUISVILLE (KY-IN) - MSA

Bullitt, Jefferson, Oldham, and Shelby, Counties, KY Clark, Floyd and Harrison Counties, IN	No. of Stores	Share of Traffic*	Principal Supplier
LEADING CHAINS:			
Kroger	28	67.0	Own, Louisville, KY
Winn Dixie	24	36.0	Own, Louisville, KY
LEADING INDEPENDENTS:			
Valu Warehouse	6	11.0	Malone & Hyde, Nicholasville, KY
Pic Pac Supermarket	10	7.0	Malone & Hyde, Nicholasville, KY
biggs	1	7.0	Super Value, OH
Melton Food Mart	6	6.0	Malone & Hyde, Nicholasville, KY
Jay C Food Store	4	5.0	Own
Buy Low Foods	3	3.0	Scot Lad, Lima, OH
Austin's Super Food	2	2.0	na
Doll's Market	3	2.0	Malone & Hyde, Nicholasville, KY
Sam's Club	2	2.0	Wal-Mart, Bentonville, AK
VOLUNTARY/COOP GROUPS			
IGA	10	3.0	Wetterau, Bloomington, IN
Key Markets	6	2.0	Various
LEADING CONVENIENCE STORES:			
Convenient Food Mart	102	17.0	Winkler Wholesale, Dale, IN
Save-A-Step	24	**	Own, Louisville, KY
OTHER GROCERY STORES	na	22.0%	
TOTAL	233	*	

na not available

* Percent of market adults who shopped in the past seven days. Total does not equal 100% due to multiple answers.

**Included in "Other Grocery Stores" percent.

Note: Above information kindly provided by THE LOUISVILLE COURIER-JOURNAL.

OWENSBORO – MSA

Daviess County	No. of Stores	% of Market Share*	Principal Supplier
LEADING STORES:			
Foodland	9		Wetterau, Greenville, KY
Kroger	3		Own, Louisville, KY
Mega Market	1		na
Save-A-Lot	1		na
Wetzel's	3		Scot Lad, Eldorado, IL
CONVENIENCE STORES:			
Convenient Food Mart	3		na
Jumpin Jack's Food Mart	5		na
Pantry	14		na
OTHER GROCERY STORES	na		
TOTAL	39		

na not available
* Share of Market data is unobtainable.
Note: Above information kindly provided by the OWENSBORO MESSENGER-INQUIRER.

LOUISIANA

ALEXANDRIA – MSA

Rapides Parish	No. of Stores	% of Market Share*	Principal Supplier
GROCERY STORES:			
A&P	3		Own, New Orleans, LA
Albertson's	1		na
Deichamp's	2		Own, Mobile, AL
F&F	2		na
Food Mart	3		na
Food Service	6		na
Kroger	1		Own, Houston, TX
Piggly Wiggly	1		Malone & Hyde, Monroe, LA
Salley's	2		Malone & Hyde, Monroe, LA
Super One	2		na
Winn Dixie	3		Own, New Orleans, LA
OTHER GROCERY STORES	na		
TOTAL	26		

na not available
* Share of Market Data is unobtainable.
Note: Above information kindly provided by the ALEXANDRIA DAILY TOWN TALK.

BATON ROUGE – MSA

Ascension, East Baton Rouge, Livingston and West Baton Rouge Parishes	No. of Stores	% of Market Share	Principal Supplier
LEADING STORES:		99.7%	
Super Fresh (A&P)	16	24.1	A&P, New Orleans, LA
Winn Dixie	14	23.5	Own, New Orleans, LA
Albertson's	3	12.2	Own, San Antonio, TX
National Supermarkets	7	11.0	Own, Harahan, LA
Associated Grocers	56	10.5	Own, Baton Rouge, LA
Hi Nabor	2	7.0	Own, Baton Rouge, LA
Delchamps	5	6.3	Own, Mobile, AL
Schwegmanns	1	5.1	Own, New Orleans, LA
OTHER GROCERY STORES	na	0.3%	
TOTAL	104	100.0%	

na not available

Note: According to our source, Baton Rouge has experienced no changes since last year.

HOUMA–THIBODAUX – MSA

Lafourche and Terrebonne Parishes	No. of Stores	% of Market Share*	Principal Supplier
GROCERY STORES:			
Big Star	6		Malone & Hyde, Inc, Broussard, LA
Delchamps	1		Own, Mobile, AL
IGA	2		na
L&N	1		na
National	3		Own, Harahan, LA
Rousos	6		P.A. Menard, Inc. New Orleans, LA
Super Foods	1		Own, Orlando, FL
Winn Dixie	3		Own, New Orleans, LA
OTHER GROCERY STORES	na		
TOTAL	23		

na not available

* Share of Market Data is unobtainable.

LAFAYETTE - MSA

Lafayette and St. Martin Parishes	No. of Stores	% of Market Share*	Principal Supplier
GROCERY STORES:			
Adrian's	2		na
Albertson's	1		na
Delchamp's	3		Own, Mobile, AL
IGA	14		na
National	1		Own, Harahan, LA
National Brand	15		na
Piggly Wiggly	3		Malone & Hyde, New Orleans, LA
Serve-O-Save	7		na
Southco	1		na
Stop & Shop	8		na
(Stop & Shop) The Superstore	1		na
Winn Dixie	3		Own, New Orleans, LA
OTHER GROCERY STORES	na		
TOTAL	59		

na not available
* Share of Market Data is unobtainable.

LAKE CHARLES - MSA

Calcasieu Parish	No. of Stores	% of Market Share*	Principal Supplier
GROCERY STORES:			
Abe's	3		na
Brookshire	2		Own, Tyler, TX
Delchamp's	3		Own, Mobile, AL
Kroger	3		Own, Houston, TX
Market Basket	10		Own, Nederland, TX
OTHER GROCERY STORES	na		
TOTAL	21		

na not available
* Share of Market Data is unobtainable.
Note: Above information kindly provided by THE LAKE CHARLES AMERICAN PRESS. According to this source, Lake Charles has experienced no changes since last year.

MONROE - MSA

Ouachita Parish	No. of Stores*	% of Market Share**	Principal Supplier
GROCERY STORES:			
Safeway	6		Own, Little Rock, AR
A&P	1		Own, New Orleans, LA
Brookshire	3		Own, Tyler, TX
Big Star	3		Malone & Hyde, Monroe, LA
County Market	1		Lewis, Indianola, MS
Budget Saver	1		Affiliated, Little Rock, AR
Piggly Wiggly	2		Malone & Hyde, Monroe, LA
OTHER GROCERY STORES	na		
TOTAL	17		

na not available
* In-house estimates.
**Share of Market Data is unobtainable.

SHREVEPORT - MSA

Bossier and Caddo Parishes	No. of Stores	% of Market Share	Principal Supplier
GROCERY STORES::		56.0%	
Brookshire	11	16.0	Own, Tyler, TX
Kroger	8	16.0	Own, Dallas, TX
Circle K	47	9.0	Southland Corp., Baton Rouge,
Albertson's-Southco	2	8.0	Waples, Dallas, TX
Price-Lo	2	2.0	Grocery Supply, Houston, TX
County Market	2	2.0	Lewis, Indianola, MS
Piggly Wiggly	2	1.0	Malone & Hyde, Monroe, LA
OTHER GROCERY STORES	na	44.0%	
TOTAL	74	100.0%	

na not available

MAINE

BANGOR - MSA

Aroostook, Hancock, Knox, Penobscot
Piscatquis, Somerset, Waldo
and Washington Counties

	No. of Stores	% of Market Share	Principal Supplier
LEADING CHAINS:		56.0%	
Shop'N Save Supermarkets	27	49.0	Hannaford Bros., Scarborough, and Super Stores ME
Shaw's Super Store	2	7.0	Shaw's, East Bridgewater, MA
VOLUNTARY &/OR CO-OP GROUPS:		33.0%	
IGA Stores	36	18.0	Wetterau-Portland, Inc. South Portland, ME
Associated Grocers	135	11.0	Associated Grocers Co., South Gardiner, ME
Yankee Grocers	9	3.0	Associated Grocers Co., South Gardiner, ME
Thriftway	7	1.0	Associated Grocers Co., South Gardiner, ME
OTHER GROCERY STORES	310	11.0%	
TOTAL	526	100.0%	

Note: Above information kindly provided by THE BANGOR DAILY NEWS. According to our source, Bangor has experienced no changes since last year.

LEWISTON-AUBURN - MSA

Part of Androscoggin County

	No. of Stores	% of Market Share*	Principal Supplier
GROCERY STORES:			
Shaw's	2		Own, East Bridgewater, MA
Shop 'N Save	10		Hannaford Bros., Co., Scarborough, ME
Borges	2		na
Food City	4		na
Future Foods	4		na
IGA	5		na
OTHER GROCERY STORES	na		
TOTAL	27		

na not available
* Share of Market Data is unobtainable.
Note: Above information kindly provided by LEWISTON SUN-JOURNAL/SUNDAY.
According to this source, Lewiston-Auburn has experienced no changes since last year.

PORTLAND – MSA

Parts of Cumberland and York Counties	No. of Stores	% of Market Share*	Principal Supplier
GROCERY STORES:			
IGA	2		Wetterau Foods, Portland, ME
Shaw's	7		Own, East Bridgewater, MA
Shop 'N Save	7		Hannaford Bros., Co., Scarborough, ME
OTHER GROCERY STORES	na		
TOTAL	16		

na not available
* Share of Market Data is unobtainable.
Note: Above information kindly provided by THE PORTLAND NEWSPAPERS. According to this source, Portland has experienced no changes since last year.

MARYLAND

CUMBERLAND (MD–WV) – MSA

Allegany County, MD and Mineral County, WV	No. of Stores	% of Market Share*	Principal Supplier
GROCERY STORES:			
Bi-Lo	2		Riverside Markets, DuBois, PA
County Market	1		Charley Bros., Greenburg, PA
Foodland	1		Wetterau of Pgh., Belle Verson, PA
Martin's	2		Giant Foods, Inc., Carlisle, PA
Super Fresh	4		A&P, Baltimore, MD
Tommy's	1		Charley Bros., Greenburg, PA
OTHER GROCERY STORES	24		
TOTAL	62		

na not available
* Share of Market Data is unobtainable.

HAGERSTOWN – MSA

Washington County	No. of Stores	% of Market Share	Principal Supplier
LEADING CHAINS:			
Martin's	3	49.0	Giant Food, Carlisle, PA
County Market	1	20.0	Various
Food Lion	1	4.0	na
Super Fresh	1	3.0	na
7-Eleven	6	na	na
Sheetz Convenience	1	na	na
TOTAL	13		

na not available

MASSACHUSETTS

BROCKTON – PMSA

Part(s) of Bristol, Norfolk and Plymouth Counties	No. of Stores	% of Market Share*	Principal Supplier
LEADING CHAINS:			
A&P	na		Own, Springfield, MA
Christy's (C)	18		Roger Williams Co., Cumberland, RI
Fernandes	1		New England Grocery Supply, Northborough, MA
Morse's Food Marts	1		Own, Canton, MA
Purity Supreme	5		Own, North Billerica, MA
Shaws	4		Own, East Bridgewater, MA
Star Markets	na		Own, Cambridge, MA Morse's
Stop & Shop	4		Own, Boston, MA
LEADING INDEPENDENTS:			
Cumberland Farms (C)	27		Own, Canton, MA
Super Place	2		na
Trucchis	3		na
OTHER GROCERY STORES	31		
TOTAL	98		

na not available
(C) Convenience Stores
* Share of Market Data is unobtainable.

FALL RIVER (MA–RI) – PMSA

Parts of Bristol County, MA Newport County, RI	No. of Stores	% of Market Share*	Principal Supplier
LEADING STORES:			
Almac's	3		Own, East Providence, RI
Grand Central	2		Roger Williams Food, Cumberland, RI
Heartland	2		Purity–Supreme, North Billerica, MA
Shaw's	2		Own, East Bridgewater, MA
Stop 'N Shop	2		Own, North Quincy, MA
Valueland	1		James Ferrera, Canton, MA
OTHER GROCERY STORES	na		
TOTAL	12		

na not available
* Share of Market Data is unobtainable.
Note: Above information kindly provided by the FALL RIVER HERALD NEWS.

FITCHBURG–LEOMINSTER – MSA

Parts of Middlesex and Worcester Counties	No. of Stores	% of Market Share*	Principal Supplier
GROCERY STORES:			
DeMoulas	3		Own, Tewksbury, MA
Farmers Wholesale	1		na
Heartland	1		Purity–Supreme, North Billerica, MA
Shaws	1		Own, Leominster, MA
Victory	6		Own, Leominster, MA
OTHER GROCERY STORES	na		
TOTAL	12		

na not available
* Share of Market Data is unobtainable.
Note: Above information kindly provided by the FITCHBURG SENTINEL & ENTERPRISE.

LAWRENCE-HAVERHILL (MA-NH) - PMSA

Parts of Essex County, MA and Rockingham County, NH	No. of Stores	% of Market Share	Principal Supplier
GROCERY STORES:		84.0%	
DeMoulas/Market Basket	10	73.0	Own, Tewksbury, MA
Barcelos	1	3.0	Associated Grocers, Manchester, NH
Purity Supreme	2	5.0	Own, North Billerica, MA and Food Center Wholesale Grocer, North Billercia, MA
Shaw's	1	3.0	na
LEADING CONVENIENCE STORES:			
Cumberland Farms	2	*	Own, Canton, MA
Lil Peach	2	*	Own, Westford, MA and Purity Supreme, Westford, MA
Richdale	2	*	Own, Lynn, MA
OTHER GROCERY STORES	na	16.0%	
TOTAL	20	100.0%	

na not available
* Included in "Other Grocery Stores" percent.
Note: According to our source, Haverhill has experienced no changes since last year.
Above information kindly provided by the HAVERHILL GAZETTE.

LOWELL (MA-NH) - PMSA

Parts of Middlesex County, MA and Hillsborough County, NH	No. of Stores	% of Market Share*	Principal Supplier
GROCERY STORES:			
Alexander's Shop N' Save	6		Hannaford Bros, Portland, ME
DeMoulas	12		Own, Tewksbury, MA
Heartland Food Warehouse	2		Purity-Supreme, North Billerica, MA
Purity-Supreme	3		Own, North Billerica, MA
OTHER GROCERY STORES	na		
TOTAL	23		

na not available
* Share of Market Data is unobtainable.
Note: Above information kindly provided by THE LOWELL SUN.

NEW BEDFORD - MSA

Bristol and Plymouth Counties	No. of Stores	% of Market Share*	Principal Supplier
GROCERY STORES:			
A&P	3		Own, Springfield, MA
Almac's	2		Own, East Providence, RI
Fernandes	2		Sweet Life, Mansfield, MA
Howland Food Mart	1		Roger Williams, Cumberland, RI
Purity	4		Own, North Billerica, MA
Shaw's	3		Own, East Bridgewater, MA
Super Place	1		Sweet Life, Mansfield, MA
Super Stop & Shop	1		Own, Quincy, MA
OTHER GROCERY STORES	na		
TOTAL	17		

na not available
* Share of Market Data is unobtainable.
Note: Above information kindly provided by THE NEW BEDFORD STANDARD-TIMES.

PITTSFIELD - MSA

Parts of Berkshire County	No. of Stores	% of Market Share*	Principal Supplier
GROCERY STORES:			
A&P	1		C&S Wholesale Grocers, Inc. Brattleboro, VT
Big Y	3		Sweet Life, Springfield, MA
Price Chopper	4		Golub Corp., Schenectady, NY
Stop & Shop	1		Own, Quincy, MA
OTHER GROCERY STORES	na		
TOTAL	9		

na not available
* Share of Market Data is unobtainable.
Note: According to our source, Pittsfield has experienced no changes since last year.

SALEM–GLOUCESTER – PMSA

Part of Essex County	No. of Stores	% of Market Share*	Principal Supplier
CHAIN STORES:			
A&P	1		Own, Springfield, MA
DeMoulas/Market Basket	1		Own, Tewksbury, MA
Purity Supreme/Heartland	4		Purity Supreme, North Billerica, MA
Shaw's	3		Own, Portland, ME
Stop & Shop	1		Own, Boston, MA
Super Stop & Shop	1		Own, Boston, MA
INDEPENDENT STORES:			
Bell Market	1		na
Brown's Market	1		na
Cape Ann Market	3		Sweet Life, Mansfield, MA
Crosby's	2		na
Danver's Butchery	1		na
Food Mart	2		na
Henry's Market	2		na
Hildonen's IGA	1		na
Ralph's Market	1		na
Steve's Market	1		na
CONVENIENCE STORES:			
Convenient Food Mart	4		Own, Reading, MA
Cumberland Farms	6		Own, Canton, MA
Richdale Dairy	11		Own, Lynn, MA
7-Eleven	2		Southland Corp., Bedford Hills, NY
White Hen Pantry	2		Own, Medford, MA
OTHER GROCERY STORES	na		
TOTAL	51		

na not available
* Share of Market Data is unobtainable.
Note: Above information kindly provided by ESSEX COUNTY NEWSPAPERS.

SPRINGFIELD – MSA

Parts of Hampden and Hampshire Counties	No. of Stores	% of Market Share	Principal Supplier
LEADING CHAINS:		79.2%	
Big Y	27	26.0	Springfield Sugar, Suffield, CT
Stop & Shop	12	24.0	Own, Boston, MA
Waldbaum's Food Mart	9	13.0	C&S, Brattleboro, VT
Shop Rite	5	12.0	Wakefern, Elizabeth, NJ
Edwards/Finast	4	10.0	Own, E. Hartford, CT
Price Chopper	8	9.0	Own, Schenectady, NY
A&P	3	7.0	Own, Springfield, MA
Grand Union	3	4.0	Own, Waterford, NY
VOLUNTARY &/OR CO-OP GROUPS:			
Super Valu	4	*	na
CONVENIENCE STORES:			
Open Pantry	9	*	na
7-Eleven	8	*	na
OTHER GROCERY STORES	na	20.8%	
TOTAL	92	100.0%	

na not available
* Included in "Other Grocery Stores" percent.
Note: Above information kindly provided by THE SPRINGFIELD UNION NEWS.

WORCESTER – MSA

Part of Worcester County	No. of Stores	% of Market Share	Principal Supplier
LEADING STORES:		91.7%	
Big Discount	12	26.9	C&S Wholsale Grocers, Inc. Brattleboro, MA
Shaws	10	21.6	Own, Worcester, MA
Stop & Shop	3	14.8	Own, North Quincy, MA
Victory	8	11.1	Wetterau, Inc., Leominster, MA
De Moulas/Market Basket	3	10.9	DeMoulas, Tewksbury, MA
Purity	1	3.2	Own, Worcester, Ma
Big Y	1	2.1	Springfield Sugar, Suffield, CT
Almacs	1	1.1	Own, Worcester, MA
OTHER GROCERY STORES	na	8.3%	
TOTAL	39	100.0%	

na not available
Note: Above information kindly provided by WORCESTER TELEGRAM & GAZETTE.

MICHIGAN

ANN ARBOR – PMSA

Washtenaw County	No. of Stores	% of Market Share*	Principal Supplier
LEADING STORES/SUPPLIERS:			
Busch's Valu-Land	2		Spartan, Grand Rapids, MI
Busters	1		Associated, Holt, MI
Dairy Mart	8		na
Farmer Jack/A&P	4		Own, Detroit, MI
Food & Drug	1		Associated, Holt, MI
Hop-In	12		na
Kroger	7		Own, Livonia, MI
Meijer	2		Own, Grand Rapids, MI
Polly's	1		Own, Jackson, MI
Savewell	2		Associated, Holt, MI
Showerman's	3		IGA, Bridgeport, MI
Walco Foods	3		IGA, Superfoods, Bridgeport, MI
OTHER GROCERY STORES	46		
TOTAL	90		

na not available
* Share of Market Data is unobtainable.

BATTLE CREEK – MSA

Calhoun County	No. of Stores	% of Market Share	Principal Supplier
GROCERY STORES:			
Felpausch	5	66.0	Spartan, Grand Rapids, MI
Meijer	1	48.0	Own, Grand Rapids, MI
Jewel Foods	1	17.0	Own, Chicago, IL
Kennedy's	1	7.0	na
Main Street Market	1	6.0	na
Orchard Park	1	3.0	na
Komarcks	1	2.0	na
Carters	1	na	na
OTHER GROCERY STORES	na		
TOTAL	12	*	

na not available
* Total does not equal 100% due to multiple answers.
Note: Above information kindly provided by the BATTLE CREEK ENQUIRER.

BENTON HARBOR–ST. JOSEPH – MSA

Berrien County	No. of Stores	% of Market Share*	Principal Supplier
LEADING CHAINS:			
Meijer	1		Own, Grand Rapids, MI
Jewel	1		Own, Chicago, IL
VOLUNTARY &/OR CO-OP GROUPS:			
Harding's	9		Spartan, Grand Rapids, MI
LEADING INDEPENDENTS:			
D&W Foods	1		Spartan, Grand Rapids, MI
Eagle Super Markets	2		Scot Lad, Lansing, IL
Farmer Fridays	1		Certified Grocers, Chicago, IL
Hilltop Foods	2		Scot Lad, Lansing, IL
Lomonico's Foodtown	1		Viking, Muskegon, MI
Plumbs	1		Spartan, Grand Rapids, MI
Schneck's Foods	1		Spartan, Grand Rapids, MI
Schrader's Supermarkets	3		Viking, Muskegon, MI
Vineland Foodland	1		Viking, Muskegon, MI
OTHER GROCERY STORES	na		
TOTAL	24		

na not available * Share of Market Data is unobtainable.
Note: Above information covers both Benton Harbor and Saint Joseph; official MSA definition refers to only Benton Harbor.

FLINT – MSA

Genesee County	No. of Stores	% of Market Share*	Principal Supplier
LEADING STORES/SUPPLIERS:			
A&P	3		Own, Detroit, MI
Capistar (Associated)	81		Own, Holt, MI
IGA	5		Own, Bridgeport, MI
Kessel	19		Own, Flint, MI
Meijer	3		Own, Grand Rapids, MI
Miller Complete Goods	1		na
Mr. B's	4		na
Spartan	13		Own, Grand Rapids, MI
VOS (Foodland) Group	3		na
OTHER GROCERY STORES*	na		
TOTAL	132		

na not available
* Share of Market Data is unobtainable.
Note: Above information kindly provided by the FLINT JOURNAL.

GRAND RAPIDS – MSA

Kent and Ottawa Counties	No. of Stores*	% of Market Share**	Principal Supplier
LEADING STORES/SUPPLIERS:			
Daanes	3		na
D&W	10		na
Eberhard	7		Own, Grand Rapids, MI
Family	2		na
Meijer	8		Own, Grand Rapids, MI
Shop Rite	7		na
OTHER GROCERY STORES	36		
TOTAL	73		

na not available
* In-house estimates.
**Share of Market Data is unobtainable.

JACKSON – MSA

Jackson County	No. of Stores	% of Market Share*	Principal Supplier
LEADING CHAINS/SUPPLIERS:			
Meijers	2		Own, Grand Rapids, MI
IGA	3		Super Foods, Bridgeport, MI
Kroger	2		Own, Livonia, MI
Polly's	4		Own, Livonia, MI
Jewel	1		Own, Chicago, IL
OTHER GROCERY STORES	na		
TOTAL	12		

na not available
* Share of Market Data is unobtainable.
Note: According to our source, Jackson has experienced no changes since last year.

KALAMAZOO – MSA

Kalamazoo County	No. of Stores*	% of Market Share**	Principal Supplier
LEADING CHAINS:			
Family Foods	4		na
Harding's	38		na
IGA	2		na
Jewel Food	3		Own, Chicago, IL
Meijer	3		Own, Grand Rapids, MI
Spartan	8		Own, Grand Rapids, MI
Viking	1		na
OTHER GROCERY STORES	na		
TOTAL	59		

na not available
* In-house estimates.
**Share of Market Data is unobtainable.
Note: According to our source, Kalamazoo has experienced no changes since last year.

LANSING–EAST LANSING – MSA

Clinton, Eaton and Ingham Counties	No. of Stores	% of Market Share*	Principal Supplier
GROCERY STORES:			
Felpausch	4		Spartan, Grand Rapids, MI
Golf	4		Spartan, Grand Rapids, MI
IGA	4		Super Foods, Bridgeport, MI
Kroger	6		Foodland, Livonia, MI
Meijer's Thrifty Acres	4		Own, Grand Rapids, MI
Quality Dairy (C)	31		Own, Lansing, MI
Schmidt	6		Capistar, Inc., Holt, MI
Seven Eleven (C)	16		na
Shop-Rite	11		Spartan, Grand Rapids, MI
Thriftway	1		Capitstar, Inc., Holt, MI
OTHER GROCERY STORES	na		
TOTAL	87		

na not available
(C) Convenience Stores
* Share of Market Data is unobtainable.

MUSKEGON – MSA

Muskegon County	No. of Stores	% of Market Share	Principal Supplier
LEADING CHAINS:		54.0%	
Meijer	2	20.0	Own, Grand Rapids, MI
Eberhard's	3	14.5	Scot Lad Foods, Chicago, IL
Thriftway	11	10.0	Viking, Muskegon, MI
D&W Food Stores	2	9.5	Spartan Stores, Grand Rapids, MI
VOLUNTARY &/OR CO-OP GROUPS:		2.5%	
IGA	2	2.5	Carpenter Cook Co., Menominee, MI
LEADING INDEPENDENTS:		34.5%	
Plumbs	7	18.0	Spartan Stores, Grand Rapids, MI
Thrif-T	5	12.0	Viking, Muskegon, MI
Punches Foods	1	2.5	Viking, Muskegon, MI
Orchard Foods	1	2.0	Viking, Muskegon, MI
LEADING CONVENIENCE STORE CHAINS:		1.0%	
7-Eleven	4	1.0	na
OTHER GROCERY STORES	na	9.0%	
TOTAL	38	100.0%	

na not available

SAGINAW-BAY CITY-MIDLAND - MSA

SAGINAW

Bay, Midland and Saginaw Counties	% of No. of Stores	Market Share	Principal Supplier
LEADING STORES:		91.2%	
Giant	5	26.8	Bay City Milling, Bay City, MI
Meijers	2	21.2	Own, Grand Rapids, MI
Kessel	4	17.9	Own, Flint, MI
A&P	2	9.0	Own, Detroit, MI
Spartan	3	7.0	Own, Grand Rapids, MI
IGA/Super Foods	3	5.4	Super Food Service, Bridgeport, MI
Bay City Milling	5	3.9	Own, Bay City, MI
OTHER GROCERY STORES*	na	8.8%	
TOTAL	24		

Note: Above information kindly provided by THE SAGINAW NEWS.

BAY CITY

	*	**	
LEADING STORES:			
A&P	1		Own, Detroit, MI
IGA	3		Super Food, Bridgeport, MI
Kroger	1		Own, Livonia, MI
Meijer	1		Own, Grand Rapids, MI
Ray's Food Fair	5		na
OTHER GROCERY STORES*	28		
TOTAL	39		

na not available
* In-house estimates.
**Share of Market Data is unobtainable.

(27) DELCHAMPS, INC.

305 Delchamps Drive
P.O. Box 1668
Mobile, Alabama 36633
(205) 433-0431

OFFICERS: Randy Delchamps, chairman, president & chief executive officer.

BUSINESS ACTIVITIES: Operates 110 supermarkets in Alabama, Florida, Mississippi and Louisiana.

NUMBER OF STORES (1990): 110

RETAIL SALES (1990): $948,257,000

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(11) FOOD LION STORES, INC.

2110 Executive Drive
P.O. Box 1330
Salisbury, North Carolina 28145-1330
(704) 633-8250

OFFICERS: Ralph W. Ketner, chairman; Tom E. Smith, president & chief exec. officer.

BUSINESS ACTIVITIES: Operates a chain of 778 supermarkets in South Carolina, Georgia, Virginia, Maryland, Tennessee, Kentucky, West Virginia, Delaware, Florida and North Carolina under the name "Food Lion". The stores sell a wide variety of groceries, produce, meats, dairy products, seafood, frozen foods, and non-food items, such as tobacco, health and beauty aids and other household and personal products.

NUMBER OF STORES (1990): 778

RETAIL SALES (1990): $5,584,410,000

(28) FOODARAMA SUPERMARKETS, INC.

303 West Main Street
P.O. Box 592
Freehold, New Jersey 07728
(201) 462-4700

OFFICERS: Joseph J. Saker, chairman of the board & president.

BUSINESS ACTIVITES: Operates a chain of 26 Shop-Rite supermarkets, of which 19 are located in New Jersey, 5 in New York, and 2 in Pennsylvania. Each store carries a wide variety of food products. In addition, 18 stores have in-store pharmacies, 2 stores have adjacent Shop-Rite liquor stores, and 2 stores have adjacent Shop-Rite garden centers.

NUMBER OF STORES (1990+): 26

RETAIL SALES (1990+): $673,124,000

+ 53 weeks

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(5) GEORGE WESTON LIMITED

22 St. Clair Avenue East
Suite 1901
Toronto, Ontario, M4T 2S7, Canada
(416) 922-2500

OFFICERS: W. Galen Weston, chairman of the board & president; Richard J. Currie, pres.- Loblaw Companies, Ltd.

BUSINESS ACTIVITIES: Diversified operations in food processing, fisheries, forest products, and wholesale-retail food distribution.

NUMBER OF STORES (1990): na

RETAIL SALES (1990): $10,856,000,000

na not available

(15) GIANT FOOD INC.

6300 Sheriff Road
Landover, Maryland 20785
(301) 341-4100

OFFICERS: Israel Cohen, chairman of the board, president & chief exec. officer.

BUSINESS ACTIVITIES: Operates a chain of 152 Giant Food supermarkets in Washington, D.C., Maryland and Virginia, of which 102 are food-pharmacy units; also operates two freestanding drug stores.

NUMBER OF STORES (1990): 152

RETAIL SALES (1991): $3,349,546,000

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(16) THE GRAND UNION COMPANY

201 Willowbrook Boulevard
Wayne, New Jersey 07470
(201) 870-6000

OFFICERS: Floyd Hall, chairman of the board and chief exec. officer; Joseph J. McCaig, president, and chief operating officer.

BUSINESS ACTIVITIES: Operates chains of four specific store types: supermarkets, community stores, food markets, and food centers.

NUMBER OF STORES: na

RETAIL SALES (1991): $2,996,572,000

(4) THE GREAT ATLANTIC & PACIFIC TEA COMPANY, INC.

Box 418
2 Paragon Drive
Montvale, New Jersey 07645
(201) 573-9700

(53.0% owned by Tengelmann Warenhandels-Gesellschaft.)

OFFICERS: James Wood, chairman of the board, president & chief exec. officer.

BUSINESS ACTIVITIES: Operates a chain of supermarkets under the A&P, Waldbaum's, Super Fresh, Farmer Jack, Kohl's, Dominion, and Miracle Food Mart trade names. Through its Compass Foods subsidiary, the company also manufactures and distributes a line of coffees under the Eight O'Clock, Bokar and Royale labels, both for sale through its own stores, and by other companies outside A&P's trading areas.

NUMBER OF STORES (1990): 1,275

RETAIL SALES (1990): $11,390,943,000

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(19) HANNAFORD BROS. CO.

145 Pleasant Hill Road
Scarborough, Maine 04074
(207) 883-2911

OFFICERS: James L. Moody, Jr., chairman of the board & chief executive officer; Hugh G. Farrington, president & chief operating officer.

BUSINESS ACTIVITIES: Sells food and non-food items through 89 wholly owned Shop'n Save, Alexander's, Sun Foods or Martin's supermarkets in Maine, Massachusetts, New Hampshire, Vermont and upstate New York. Operates 41 wholly owned Wellby Super Drug Stores and 20 separate pharmacies within supermarkets or combination stores. Owns a wholesale distributor of specialty foods, general merchandise, pharmaceuticals, and health and beauty aids.

NUMBER OF STORES (1990): 130

RETAIL SALES (1990): $1,687,649,000

(25) INGLES MARKETS, INC.

P.O. Box 6676
Asheville, North Carolina 28816
(704) 669-2941

OFFICERS: Robert P. Ingle, chairman of the board & chief executive officer; Landy B. Laney, president & chief operating officer.

BUSINESS ACTIVITIES: Operates 170 supermarkets in North Carolina, South Carolina, Georgia, Tennessee and Virginia. The company's supermarkets offer the customer a broad selection of quality products at competitive prices. In conjunction with its supermarket activities, the company operates 65 neighborhood shopping centers, each of which contains an Ingles supermarket.

NUMBER OF STORES (1990): 170

RETAIL SALES (1990): $1,006,789,529

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(2) THE KROGER CO.

1014 Vine Street
Cincinatti, Ohio 45201
(513) 762-4000

OFFICERS: Lyle Everingham, chairman of the board & chief exec. officer; Joseph A. Pichler, chairman of the board & chief executive officer.

BUSINESS ACTIVITIES: Operates a chain of supermarkets in 32 states primarily in the South, Southwest and Midwest; operates a chain of convenience stores in 16 states; also conducts food processing operations.

NUMBER OF STORES (1990): 1,255 (supermarkets)
959 (convenience)

RETAIL SALES (1990*): $20,260,974,000

* Of continuing operations only.

(7) LOBLAW COMPANIES LIMITED

22 St. Clair Avenue East
Toronto, Ontario, M4T 2S8, Canada
(416) 922-8500

(77.0% owned by George Weston, Ltd.)

OFFICERS: W. Galen Weston, chairman of the board; Richard J. Currie, president.

BUSINESS ACTIVITIES: A Canadian holding company controlling major interests in food retailing and wholesaling in Canada and the United States. In addition to its food-related operations, Loblaw, through its subsidiaries, also participates in the Canadian general merchandise industries.

NUMBER OF STORES (1990): 329

RETAIL SALES (1989): $8,416,600,000

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(22) MARSH SUPERMARKETS, INC.

9800 Crosspoint Boulevard
Indianapolis, Indiana 46256-3350
(317) 594-2100

OFFICERS: Don E. Marsh, chairman of the board, president & chief exec. officer; C. Alan Marsh, president & chief operating officer-Marsh Village Pantries, Inc..

BUSINESS ACTIVITIES: Operates Marsh supermarkets, Marsh Xtra combination food and drug stores, and Village Pantry convenience stores, in Indiana and Ohio. Most of the Village Pantry stores also sell gasoline. A subsidiary, Convenience Store Distributing Company, distributes goods to the company's convenience stores as well as to 1,400 other convenience stores in a six-state area.

NUMBER OF STORES (1991): 80 (Marsh Stores)
168 (Village Pantrys)

RETAIL SALES (1990): $992,306,000

(18) NASH FINCH COMPANY

3381 Gorham Avenue
St. Louis Park, Minnesota 55426
(612) 929-0371

OFFICERS: Harold B. Finch, Jr., chairman & chief executive officer; Russell N. Mammel, president & chief operating officer.

BUSINESS ACTIVITIES: The company has three primary business segments: Wholesale Distribution, Retail Distribution, and Produce Marketing. The wholesale distribution is the largest. Nash Finch's, 16 distribution centers in 11 states supply customers in 24 states with a wide range of food and general merchandise. The retail distribution segment represents 87 stores in 12 states that Nash Finch owns and operates. Stores operate under a variety of names, including Econofoods, Food Bonanza, Sun Mart, Jack & Jill, Piggly Wiggly, Farm Fresh and others. The company also owns a produce marketing subsidiary in California that sells fresh fruit and vegetables to large wholesalers and chain retailers.

NUMBER OF STORES (1990): 87

RETAIL SALES (1990): $2,341,566,071

+ Includes operating revenues and other income.

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(23) NATIONAL CONVENIENCE STORES INCORPORATED

100 Waugh Drive
Houston, Texas 77007
(713) 863-2200

OFFICERS: V.H. Van Horn, president & chief exec. officer.

BUSINESS ACTIVITIES: Operates a chain of 1,090 self-service convenience food stores in Texas, Florida, Georgia, Tennessee and California, with the majority of the stores located in Texas. Most stores are company-owned and operated under the name "Stop N Go", and sell staple foods, groceries, beverages, snack foods, and other food items.

NUMBER OF STORES (1990): 1,090

RETAIL SALES (1990): $1,062,183,000

(13) THE OSHAWA GROUP LIMITED

302 The East Mall
Etobicoke, Ontario, M9B 6B8, Canada
(416) 236-1971

OFFICERS: Allister P. Graham, chairman & chief executive officer.

BUSINESS ACTIVITIES: A Canadian company principally engaged in marketing food and pharmaceuticals through a network of distribution centers and retail stores in eight provinces. The company operates 101 supermarkets: 53 Food City, 37 IGA, 7 Dutch Boy and 4 others, and 149 drug stores - 106 Pharma Plus, 30 Drug City and 13 Metro Drugs. There are also 10 pharmacies in supermarkets and other retial outlets.

NUMBER OF STORES (1991): 954 (IGA Associates and Other Franchise Food Markets)
101 (company-owned food markets)

RETAIL SALES (1991): $4,598,798,000

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(17) THE PENN TRAFFIC COMPANY

319 Washington Street
Johnstown, Pennsylvania 15901
(814) 536-9900

(53%-owned by Riverside Acquisition Company, Limited Partnership, an affiliate of Miller Tabak Hirsch & Co.)

OFFICERS: Gary D. Hirsch, chairman, Claude J. Incaudo, president & chief executive officer.

BUSINESS ACTIVITIES: The company has three business units. The originally-acquired company Penn Traffic (RDQ); P&C Food Markets, Inc. (P&C); and Big Bear Stores Company (Big Bear). These operations are regionally-based retail and wholesale food distribution companies which conduct business primarily in suburban and exurban communities of upstate New York, western Pennsylvania, central Ohio and northwestern West Virginia.

NUMBER OF STORES (1990): 301 (supermarkets)
31 (supermarket/dept. stores)

RETAIL SALES (1990+*): $2,699,847,000

+ Includes leased departments and service fees.
* 53 weeks

(24) RISER FOODS, INC.

5300 Richmond Road
Bedford Heights, Ohio 44146
(216) 292-7000

OFFICERS: Anthony C. Rego, co-chairman & joint chief exec. officer; Michael L. Borstein, vice chairman of the board, Charles A Rini, Sr., president & chief oper. officer.

BUSINESS ACTIVITIES: The company is a major regional food retail and wholesale company. Riser Foods was formed through the combination of Fisher Foods, Inc., Rini Supermarkets, Rego Supermarkets and American Seaway Foods, Inc. The company operates 50 supermarkets in Northeast Ohio, one deep discount store, a wholesale food distribution business, food service division and an ice cream manufacturing operation.

NUMBER OF STORES (1990): 51

RETAIL SALES (1990): $1,054,496,000

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(20) RUDDICK CORPORATION

2000 Two First Union Center
Charlotte, North Carolina 28282
(704) 372-5404

OFFICERS: R. Stuart Dickson, chairman of the board; Alan T. Dickson, president.

BUSINESS ACTIVITIES: A holding company, operating 130 supermarkets in North and South Carolina, Tennessee and Virginia through its subsidiary, Harris-Teeter, Inc. The company also controls various manufacturing and distribution operations, and is involved in venture capital investments.

NUMBER OF STORES (1990): 130

RETAIL SALES (1988*): $1,422,081,000

* Of continuing operations only

(8) THE SOUTHLAND CORP.

2711 North Haskell Avenue
Dallas, Texas 75204
(214) 828-7011

(75% owned by Ito-Yokado Co., Ltd., and 7-Eleven Japan Co., Ltd.)

OFFICERS: Masatoshi Ito, chairman of the board.

BUSINESS ACTIVITIES: Operator and franchisor of self-service convenience stores. As of December 31, 1990, there were 6,455 7-Eleven convenience stores in the United States & Canada, 187 High's Dairy Stores, five distribution centers, six food processing centers, and 63 Quick Mart and Super-7 high volume gasoline outlets, with mini convenience centers.

NUMBER OF STORES* (1990): 6,455

REVENUES+ (12/31/90): $8,347,681,000

* 7-Eleven stores only
+ Includes franchised stores and other income; of continuing operations only

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(26) SUPER RITE FOODS HOLDINGS CORPORATIONS

3900 Industrial Road
P.O. Box 2261
Harrisburg, Pennsylvania 17110
(717) 232-6821

OFFICERS: Alex Grass, chairman of the board.

BUSINESS ACTIVITIES: A full service grocery wholesaler and retailer. Super Rite's wholesale division currently services customers in Pennsylvania, New Jersey, Maryland, Delaware, Virginia and West Virginia. Its retail division includes 28 supermarkets operating under the name "Basics" in the Baltimore, Maryland and Washington, DC areas.

NUMBER OF STORES (fiscal year end 1990): 28

RETAIL SALES (3/2/91): $961,768,000

(3) SUPER VALU STORES, INC.

P.O. Box 990
Minneapolis, Minnesota 55440
(612) 828-4000

OFFICERS: Michael W. Wright, chairman, president & chief executive officer.

BUSINESS ACTIVITIES: Engaged principally in the supplying and servicing of nearly 2,800 retail food stores in 33 states from 47 distribution centers. Independent retailers own and operate more than 2,700 of the retail food stores and the Company owns all or a majority interest of the remaining 94 stores. Most of the stores operate under one of the Super Valu licensed or sub-licensed names: Super Valu, IGA, Sure Save, Shop 'n Save, Great Scot, County Market, Cub Foods, Hornbachers, U-Save, Disco, Super Dollar, Sunflower, Twin Valu and Banner. The Company also owns and operates the ShopKo group of 104 general merchandise discount stores. Other operations include Preferred Products, a food processing and packaging operation; Planmark, which provides engineering and architectural services for supermarkets, retail stores, shopping centers and wholesale distribution facilities; Studio 70, an interior design studio; and Risk Planners, Inc., an insurance agency.

NUMBER OF STORES (1991): 94

RETAIL SALES (1991+*): $11,612,388,000

+ Of continuing operations only

* 53 weeks

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(10) SUPERMARKETS GENERAL HOLDINGS CORPORATION

301 Blair Road
Woodbridge, New Jersey 07095
(201) 499-3000

OFFICERS: Jack Futterman, chairman, president, and chief executive officer.

BUSINESS ACTIVITIES: Operates a chain of supermarkets under the Pathmark name in New York, New Jersey, Connecticut, Delaware and Pennsylvania; supermarkets and super warehouse stores under the names Purity Supreme, Heartland and Angelo's in Massachusetts, New Hampshire and Connecticut; conventional drug stores in New York, Connecticut, and New Jersey under the Pathmark and Heartland names; Rickel Home Centers in Delaware, Connecticut, Maryland, New Jersey, New York, Rhode Island and Pennsylvania selling such items as lumber, plumbing fixtures, garden tools and supplies and other household items. The company also operates two and has granted franchises for 61 Li'l Peach convenience stores in Massachusetts.

NUMBER OF STORES (1990): 211

RETAIL SALES (2/2/91+): $6,125,963,000

+ Company

(12) THE VONS COMPANIES, INC.

618 Michillinda Avenue
Arcadia, California 91007
(818) 821-7000

OFFICERS: Roger E. Strangeland, chairman of the board & chief executive officer; William S. Davila, president; Dennis K. Eck, vice chairman & chief operating officer.

BUSINESS ACTIVITIES: Operates 320 supermarkets and food-and-drug combination stores throughout Southern California and Clark County, Nevada, under the names Vons Supermarkets (209), Vons Food and Drug Combination Stores (77); Pavilions/ Pavilions Place (26), and Tianglus (8). Also operates a bakery and processes food and dairy products.

NUMBER OF STORES (1990): 320

RETAIL SALES (12/30/90) $5,333,900,000

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(21) WEIS MARKETS, INC.

1000 South Second Street
Sunbury, Pennsylvania 17801
(717) 286-4571

OFFICERS: Sigfried Weis, president.

BUSINESS ACTIVITIES: Operates supermarkets in Pennsylvania, New York, West Virginia and Maryland, under the name of Weis Markets. Weis Food Service distributes frozen foods and grocery items to restaurants and institutions. Also operates 5 Amity House Restaurants.

NUMBER OF STORES (1990): 118

RETAIL SALES (1990): $1,291,806,000

(6) WINN-DIXIE STORES, INC.

5050 Edgewood Court
Post Office Box B
Jacksonville, Florida 32203
(904) 783-5000

OFFICERS: A. Dano Davis, chairman of the board; Robert D. Davis, vice chairman; James Kufeldt, president & chairman of executive committee.

BUSINESS ACTIVITIES: Operates Winn-Dixie food stores in Florida, Georgia, North Carolina, South Carolina, Alabama, Mississippi, Louisiana, Virginia, Kentucky, Tennessee, Indiana, Oklahoma and Texas.

NUMBER OF STORES (1990): 1,217

RETAIL SALES (1990): $9,744,494,000

Source: Fairchild's Retail Stores Financial Directory, 1991/1992
Book Division, Fairchild Fashion & Merchandising Group, New York, NY
Robert Benjamin - Chief Research Editor

Section 4: Grocery Store Statistical Profile

DISTRIBUTION OF FOOD STORE SALES BY GEOGRAPHIC REGION: 1989, 1990

	1990	1989
U.S. Total	100.0%	100.0%
Northeastern States (New England, Middle Atlantic)	22.1	22.4
North Central States (East North Central, West North Central)	21.4	21.8
South (South Atlantic, East South Central, West South Central)	34.7	34.4
West (Mountain, Pacific)	21.9	21.6

The Survey of Buying Power Demographics USA, 1991
Sections 2 and 8
Sales & Marketing Management Magazine, New York, NY
Publishers

PER CAPITA SALES OF FOOD STORES BY GEOGRAPHIC REGION: 1989, 1990

	1990	1989
U.S. Total	$ 1,446	$ 1,400
Northeastern States	1,569	1,533
North Central States	1,297	1,252
South	1,399	1,393
West	1,475	1,453

The Survey of Buying Power Demographics USA, 1991
Sections 2 and 8
Sales & Marketing Management Magazine, New York, NY
Publishers

DISTRIBUTION OF THE U.S. RESIDENT POPULATION, EBI & SUPERMARKET SALES, BY REGION AND STATE, 1990

	POPULATION	EFFECTIVE BUYING INCOME	SUPERMKT SALES
U.S. TOTAL	250.8*	$3,499.3**	$ 340.5**
	100.0%	100.0%	100.0%
New England	5.3	6.2	6.2
Connecticut	1.3	1.7	1.5
Maine	0.5	0.5	0.7
Massachusetts	2.4	2.9	2.7
New Hampshire	0.4	0.5	0.7
Rhode Island	0.4	0.4	0.4
Vermont	0.2	0.2	0.3
Middle Atlantic	15.0	17.1	15.2
New Jersey	3.1	4.2	3.6
New York	7.2	8.2	6.9
Pennsylvania	4.7	4.8	4.7
East North Central	16.8	16.5	14.6
Illinois	4.6	4.9	4.0
Indiana	2.2	2.7	1.8
Michigan	3.7	3.6	3.1
Ohio	4.3	4.1	4.0
Wisconsin	2.0	1.9	1.8
West North Central	7.1	6.7	6.8
Iowa	1.1	1.0	1.2
Kansas	1.0	1.0	1.0
Minnesota	1.8	1.7	1.7
Missouri	2.1	1.9	2.0
Nebraska	0.6	0.6	0.5
North Dakota	0.3	0.2	0.2
South Dakota	0.3	0.2	0.3
South Atlantic	17.6	17.1	18.1
Delaware	0.3	0.3	0.3
District of Columbia	0.2	0.3	0.2
Florida	5.3	5.3	5.6
Georgia	2.6	2.4	2.6
Maryland	1.9	2.3	1.9
North Carolina	2.7	2.3	2.6
South Carolina	1.4	1.1	1.5
Virginia	2.5	2.6	2.8
West Virginia	0.7	0.5	0.7

DISTRIBUTION OF THE U.S. RESIDENT POPULATION, EBI & SUPERMARKET SALES, BY REGION AND STATE, 1990

- continued -

	POPULATION	EFFECTIVE BUYING INCOME	SUPERMKT SALES
East South Central	6.1	4.9	5.2
Alabama	1.6	1.3	1.4
Kentucky	1.5	1.2	1.3
Mississippi	1.0	0.7	0.8
Tennessee	2.0	1.7	1.6
West South Central	10.7	9.2	12.0
Arkansas	0.9	0.7	1.0
Louisiana	1.7	1.3	2.1
Oklahoma	1.3	1.0	1.3
Texas	6.8	6.1	7.6
Mountain	5.5	4.8	5.8
Arizona	1.5	1.3	1.7
Colorado	1.3	1.3	1.4
Idaho	0.4	0.3	0.4
Montana	0.3	0.3	0.4
Nevada	0.5	0.5	0.6
New Mexico	0.6	0.5	0.5
Utah	0.7	0.5	0.7
Wyoming	0.2	0.2	0.2
Pacific	15.9	17.5	16.1
Alaska	0.2	0.2	0.3
California	12.1	13.7	11.8
Hawaii	0.4	0.5	0.6
Oregon	1.1	1.0	1.2
Washington	2.0	2.0	2.3

* In thousands

** In millions of $'s

Source: The Survey of Buying Power Demographics USA, 1991
Sections 2 and 8
Sales & Marketing Management Magazine, New York, NY

Section 5: Additional Supermarket Data

Calendar of Industry Events

Directory of Food Associations

CALENDER OF INDUSTRY EVENTS–1992

MARCH

1-3 National Association for the Specialty Food Trade, 17th winter international fancy food and confection show, Moscone Center, San Francisco

1-4 National-American Wholesale Grocers Association and International Food Service Distributors, annual meeting, Bal Harbour, Florida.

1-4 Food Marketing Institute, loss prevention conference, Phoenix, Arizona.

6-10 National Food Processors Association, FEAST 1992 - 85th food exposition about science and technology, Lowes Anatole Hotel, Dallas, Texas.

7-9 Council for Agricultural Science and Technology, annual meeting, Washington, D.C.

7-10 Food Marketing Institute, United Fresh Fruit and Vegetable Association, National American Wholesale Grocers Association, Produce Marketing Association, annual produce conference, Sheraton Harbor Place, Ft. Meyers, Florida.

8-9 Video Software Dealers Association, regional video expo, Orlando, Florida.

8-10 National Association of Specialty Food and Confection Brokers, international fancy food show, San Francisco.

8-11 Cosmetic, Toiletry, and Fragrance Association, annual meeting, Boca Raton, Florida.

8-11 Food Marketing Institute, performance skills for effective store management, Atlanta.

8-12 National Wholesale Druggists' Association, marketing conference, San Antonio, Texas.

11 International Dairy-Deli Association, dairy, deli, bake, fast break workshop, Seattle.

11-13 National Food Brokers Association, technology forum, Westin Hotel Galleria, Dallas, Texas.

12 International Dairy-Deli Association, dairy, deli, bake, fast break workshop, Portland, Oregon.

14-18 American Pharmaceutical Association, annual meeting, San Diego.

15-18 Private Label Manufacturers Association, annual meeting and leadership conference, Lowes Ventana Canyon, Tucson, Arizona.

15-17 Food Marketing Institute, merchandising for tomorrow conference, Fairmont Hotel, New Orleans.

(continued)

MARCH

17-19 National Association of Chain Drug Stores, public policy conference, Washington, D.C.

17-19 National Fisherman Expositions, international Boston seafood show, Hynes Convention Center, Boston.

20-21 Retail Bakers Association, 23rd annual bakery-deli conference, Anaheim, California.

20-22 National Association of Meat Purveyors, 49th annual convention, Kansas City, Missouri.

21-24 Retail Bakers Association, 74th anniversary convention-exhibition, Anaheim, California.

22-24 Food Marketing Institute, meat marketing conference, Boston.

22-24 International Association of Chain Stores, Madcap Forum, Dresden, Germany.

22-25 Food Marketing Institute, advertising/marketing executives conference, Phoenix, Arizona.

22-25 Food Marketing Institute, supermarket operations management course, West Lafayette, Indiana.

23-24 Food Marketing Institute, National Association of Convenience Stores, public affairs assembly, Hyatt Regency, Washington, D.C.

27-30 Chain Drug Marketing Association, annual meeting, Chicago.

30-31 National Cheese Institute, annual meeting, Grand Hyatt, Washington, D.C.

APRIL

2-3 National Food Brokers Association, maximizing broker management forum, Chicago.

4-9 Western Association of Food Chains, 71st annual convention, Marriott Hotel and Marina, San Diego.

5-6 Video Software Dealers Association, regional video expo, Vancouver, British Columbia.

5-8 Dairy and Food Industries Supply Assocaition, annual convention, RAncho Las Palmas, Palm Springs.

5-10 Food Marketing Institute, professional management course, Hillsdale, Michigan.

7-8 New England Deli-Dairy Association, annual conference, Boston.

12-14 Food Marketing Institute, pharmacy conference, LeMeriden San Diego at Coronado, Coronado, California.

(continued)

APRIL

12-16 Food Marketing Institute, training development forum, Atlanta, Georgia.

22-24 National Food Brokers Association, top to top conference. TBA.

25-29 National Association of Chain Drug Stores, annual meeting, Grand Hyatt, Maui, Hawaii.

26-27 Video Software Dealers Association, regional video expo, midwest location TBA.

26-30 Retail Bakers Association, bakery-deli conference and convention exhibition, Anaheim, California.

26-30 International Association of Chain Stores, logistics management program, Stockholm, Sweden, and Helsinki, Finland.

MAY

2-6 National Association of Boards of Pharmacy, annual meeting, Salt Lake City.

3-6 Food Marketing Institute, annual supermarket industry convention and education exposition, McCormick Place, Chicago.

9-17 AMK Berlin Company for Exhibitions, Fairs and Congresses, 15th international bakery trade fair, iba '92, convention, Berlin.

12-13 Tri-State Dairy-Deli Association, 13th annual taste show, Taj Mahal Hotel and Casino, Atlantic City, New Jersey.

14-22 American Meat Institute, international meat trade fair, Frankfurt, Germany.

16-20 National Restaurant Association, annual convention, Chicago.

17-20 Food Marketing Institute, financial executives conference, San Diego, California.

19-20 Private Label Manufacturers Association, international trade show, Parc de Expositions, Brussels, Belgium.

21-26 Private Label Manufacturers Association, special trade mission to Russia, Moscow.

24-27 Food Marketing Institute, performance skills for effective store management, Los Angeles.

24-27 Canadian Council of Grocery Distributors, annual convention, Ottowa.

29
June 3 General Merchandise Distributors Council, health and beauty care conference, Princess Hotel, Scottsdale, Arizona.

JUNE

3 Food Marketing Institute, cashier test battery, Denver.

6-9 National Food Brokers Association, general merchandise and health and beauty care conference, Cheyenne Mountain Conference Center and Resort, Colorado Springs, Colorado.

7-9 Canadian Association of Warehousing and Distribution Services, annual convention, Toronto.

7-9 Food Marketing Institute, legal conference, Portland, Maine.

7-9 International Association of Chain Stores, international retail forum, Amsterdam, Netherlands.

7-9 International Dairy-Deli Association, annual meeting and convention, New Orleans Convention Center.

14-17 Food Marketing Institute, ergonomics and workplace safety conference, Cincinnati.

14-17 GMA, marketing executive conference, Greenbriar, West Virginia.

17-18 Private Label Manufacturers Association, "consumerama" annual convention, Toronto.

28
July 1 National Association of Chain Drug Stores, marketplace conference, Marriott and New Orleans Convention Center.

JULY

9-12 American Association of Meat Processors, annual meeting, Orlando World Center, Florida.

22 National Food Brokers Association, confectionery and snack foods seminar, Boston.

26-28 Food Marketing Institute, PMA, National American Wholesale Grocers Association, produce conference, Monterey, California.

26-29 National Association for the Specialty Food Trade, 38th annual international fancy food and confection show, Washington Convention Show, Washington, D.C.

26-29 Video Software Dealers Association, annual convention, Las Vegas.

AUGUST

9-12 Food Marketing Institute, seafood conference, Seattle.

9-11 National Food Brokers Association, frozen food conference, Oak Brook Hills Convention Center, Oak Brook, Illinois.

10-12 National Food Distributors Association, 65th annual convention and trade show, Las Vegas, Hilton.

29
Sept 3 National Association of Chain Drug Stores, pharmacy conference, Sheraton Hotel, Chicago.

30
Sept 5 International Association of Chain Stores, Asian retail executive seminar, Singapore.

SEPTEMBER

13-14 Video Software Dealers Association, regional video expo, Santa Clara, California.

13-15 Food Marketing Institute, food protection conference, Washington, D.C.

13-16 Food Marketing Institute, information systems conference, TBA.

13-16 National American Wholesale Grocers Association, midyear conference, Hilton Head, South Carolina.

14-16 National Food Brokers Association, marketing fiesta, Oak Brook Hills Conference Center, Oak Brook, Illinois.

18-23 General Merchandise Distributors Council, general merchandise conference, Doral Resort and Country Club, Miami.

20-23 Food Marketing Institute, performance skills for effective store management, Denver.

22-24 Exclusively HBA, health and beauty aids conference, Denver.

OCTOBER

TBA Food Marketing Institute, risk management conference, New Orleans.

2-7 Food Institute of Canada, annual convention, Victoria, British Columbia.

3-5 California Grocers Association, annual convention and trade show, San Diego Convention Center.

4-7 National Frozen Food Association, annual convention and exposition, Dallas.

(continued)

OCTOBER

4-9	Food Marketing Institute, supermarket operations management course, West Lafayette, Indiana.
4-11	International Association of Chain Stores, Young Executives study tour, United States.
10-13	Produce Marketing Association, convention and expo, Denver.
11-12	Video Software Dealers Association, regional video expo, Boston.
11-13	Food Marketing Institute, executive conference. Australia.
18-21	Food Marketing Institute, supermarket food service conference, San Francisco.
18-21	Food Marketing Institute, performance skills management conference, Philadelphia.
21-22	Eastern Dairy Deli Association, annual taste show, Meadowlands Convention Center, Secaucus, New Jersey.
21-23	International Association of Chain Stores, conference on logistics, Rotterdam, The Netherlands.
25-28	Food Marketing Institute, general merchandise/health and beauty care conference, New Orleans.
25-28	National American Wholesale Grocers Association, productivity conference, Atlanta.
25-30	Food Marketing Institute, professional management course, Hillsdale, Michigan.

NOVEMBER

4	Food Marketing Institute, cashier test battery, Baltimore.
4-10	National Association of Service Merchandising, annual conference, Reno, Nevada.
8-10	Food Marketing Institute, in-store systems conference, New Orleans.
12	Food Marketing Institute, regional media conference, TBA.
15-18	Private Label Manufacturers Association, annual trade show, O'Hare Expo Center, Chicago.

DECEMBER

6-11	National Food Brokers Association, convention marketplace expo, Hilton, New Orleans.

Source: Supermarket News Magazine, (January 6, 1992)
Fairchild Fashion & Merchandising Group, New York, NY

DIRECTORY OF FOOD ASSOCIATIONS

American Association of Cereal Chemists
3340 Pilot Knob Road
St. Paul, MN 55121
(612) 454-7250

American Association of Meat Processors
P.O. Box 269
Elizabethtown, PA 17022
(717) 367-1168

American Dairy Association
6300 North River Road
Rosemont, IL 60018
(708) 696-1880

American Egg Board
1460 Renaissance Drive
Suite 301
Park Ridge, IL 60068
(708) 296-7044

American Frozen Food Institute
1764 Old Meadow Road, Suite 350
McLean, VA 22102
(703) 821-0770

American Honey Producers Association
P.O. Box 368
Bruce, SD 57220
(605) 627-5621

American Institute of Food Distribution
28-12 Broadway
Fair Lawn, NJ 07410
(201) 791-5570

American Meat Institute
1700 North Moore Street, Suite 1600
Arlington, VA 22209
(703) 841-2400

American Mushroom Institute
907 E. Baltimore Pike
Kennett Square, PA 19348
(215) 388-7806

American Shrimp Processors Association
P.O. Box 50774
New Orleans, LA 70150
(504) 368-1571

American Spice Trade Association
P.O. Box 1267
Englewood Cliffs, NJ 07632
(201) 568-2163

American Sugar Cane League of the U.S.A.
P.O. Drawer 938
Thibodaux, LA 70302
(504) 448-3707

Association for Dressings and Sauces
5775 Peachtree-Dunwoody Road, Suite 500D
Atlanta, GA 30342
(404) 252-3663

Association of Food and Drug Officials
Box 3425
York, PA 17402
(717) 757-2888

Association of Coupon Processors
500 N Michigan Ave.
Suite 1400
Chicago, IL 60611
(312) 661-1700

Association of Food Industries
Box 776
Matawan, NJ 07747
(201) 583-8188

Association for Consumer Research
Graduate School of Management
632 TNRB, Brigham Young University
Provo, UT 84602
(801) 378-2060

Beer Institute
1225 Eye Street, N.W., Suite 825
Washington, D.C. 20005
(202) 737-2337

Biscuit & Cracker Distributors Association
111 E. Wacker Drive
Chicago, IL 60601
(312) 644-6610

Biscuit & Cracker Manufacturers' Association
1400 L Street, N.W., Suite 400
Washington, DC 20005
(202) 898-1636

Board of Trade of the Wholesale Seafood Merchants
7 Dey Street, Suite 905
New York, NY 10007
(212) 732-4340

Calorie Control Council
5775 Peachtree-Dunwoody Road, Suite 500D
Atlanta, GA 30342
(404) 252-3663

Coffee, Sugar and Cocoa Exchange
4 World Trade Center
New York, NY 10048
(212) 938-2800

Cosmetic, Toiletry and Fragrance Assoc.
1100 17th Street, N.W.
Washington, DC 20036
(202) 331-1770

Dairy and Food Industries Supply Association
6245 Executive Blvd.
Rockville, MD 20852
(301) 984-1444

Enteral Nutrition Council
5775 Peachtree-Dunwoody Road, Suite 500
Atlanta, GA 30342
(404) 252-3663

Fiber Society
Box 625
Princeton, NJ 08542
(609) 924-3150

Food and Drug Law Institute
1000 Vermont Avenue, N.W., #1200
Washington, DC 20005
(202) 371-1420

Food Equipment Manufacturers Association
111 E. Wacker Drive
Chicago, IL 60601
(312) 644-6610

Food Executive Club of Florida
2727 N. Ocean Blvd.
Suite 302A
Boca Ratan, FL 33431
(407) 368-9628

Food Industries Suppliers' Association
Box 2064
Fairfield Glade, TN 38557
(615) 456-2205

Food Marketing Institute
1750 K Street, N.W., Suite 700
Washington, D.C. 20006
(202) 452-8444

Foodservice Equipment Distributors
Association
332 S. Michigan Avenue, Suite 1840
Chicago, IL 60604
(312) 427-9605

Gelatin Manufacturers Institute
of America
516 Fifth Avenue, Room 507
New York, NY 10036
(212) 575-1234

General Merchandise Distributors Council
1275 Lake Plaza Drive
Colorado Springs, CO 80906
(719) 576-4260

The United States Glutamate Assocation
5775 Peachtree-Dunwoody Road, Suite 500D
Atlanta, GA 30342
(404) 252-3663

Grocery Manufacturers of America
1010 Wisconsin Avenue, N.W.,
Suite 800
Washington, D.C. 20007
(202) 337-9400

Institute of Food Technologists
221 N. La Salle Street, Suite 300
Chicago, IL 60601
(312) 782-8424

International Apple Institute
P.O. Box 1137
McLean, VA 22101-1137
(703) 442-8850

International Association of Milk, Food
and Environmental Sanitarians
P.O. Box 701
Ames, IA 50010
(515) 232-6699

International Bottled Water Association
113 N. Henry Street
Alexandria, VA 22314
(703) 683-5213

International Center for Companies of the
Food Trade & Industry-North American Hdqtrs.
3800 Moore Place
Alexandria, VA 22305
(703) 549-4525

International Dairy-Deli Association
Box 29632
Atlanta, GA 30359
(404) 325-4322

International Food Additives Council
5775 Peachtree-Dunwoody Road, Suite 500D
Atlanta, GA 30342
(404) 252-3663

International Foodservice Distributors Association
201 Park Washington Court
Falls Church, VA 22046
(703) 532-9400

International Frozen Food Association
1764 Old Meadow Lane, Suite 350
McLean, VA 22102
(703) 821-0770

International Institute of Foods
225 W. Ohio Street, 6th Floor
Chicago, IL 60610
(312) 670-0200

International Technical Caramel Association
1575 Eye Street N.W.
(914) 332-1491
Washington, D.C. 20005
(202) 789-7577

Leafy Greens Council
Box 76067
St. Paul, MN 55175
(612) 222-3232

National American Wholesale Grocers' Association
201 Park Washington Court
Falls Church, VA 22046-4521
(703) 532-9400

National Association for the Specialty Food Trade
215 Park Avenue South, #1606
New York, NY 10003
(212) 505-1770

National Association of Convenience Stores
1605 King Street
Alexandria, VA 22314
(703) 684-3600

National Association of Fruits, Flavors & Syrups
Box 776
Matawan, NJ 07747
(201) 583-8272

National Association of Meat Purveyors
8365-B Greensboro Drive
McLean, VA 22102-3585
(703) 827-5754

National Association of Service Merchandisers
118 South Clinton, Suite 300
Chicago, IL 60606
(312) 876-9494

National Association of Specialty Food and Confection Brokers
1 Central Avenue
Lyceum Bldg., Suite 214
Tarrytown, NY 10591

National Beer Wholesalers' Association
5205 Leesburg Pike, Suite 1600
Falls Church, VA 22401
(703) 578-4300

National Candy Wholesalers Association
1120 Vermont Avenue, N.W.
Suite 1120
Washington, D.C. 20005
(202) 463-2124

National Cheese Institute
888 16th Street, N.W.
Washington, D.C. 20006
(202) 659-1454

National Confectioners Association
of the U.S.
7900 Westpark Drive, Suite A320
McLean, VA 22102
(703) 790-5750

National Corn Growers Association
1000 Executive Parkway, Suite 105
St. Louis, MO 63141
(314) 275-9915

National Dry Bean Council
P.O. Box 6008
Saganaw, MI 48606
(517) 790-3010

National Food and Energy Council
409 Vandiver West, Suite 202
Columbia, MO 65202
(314) 875-7155

National Food Brokers Association
1010 Massachusetts Avenue, N.W.
Washington, D.C. 20001
(202) 789-2844

National Food Distributors Association
401 N. Michigan Ave.
Chicago, IL 60611
(312) 644-6610

National Frozen Food Association
P.O. Box 398
Hershey, PA 17033
(717) 534-1601

National Grocers Association
1825 Samuel Morse Drive
Reston, VA 22090-5317
(703) 437-5300

National Housewares Manufacturers
Association
1324 Merchandise Mart
Chicago, IL 60654-9920
(312) 644-3333

National Independent Dairy-Foods Association
321 D Street, N.E.
Washington, D.C. 20002
(202) 543-3838

National Independent Poultry and Food
Distributors Association
404 BNA Drive
Building 200, Suite 101
Nashville, TN 37217-2517
(615) 360-3901

National Juice Products Association
P.O. Box 1531, 215 Madison Street
Tampa, FL 33601
(813) 229-1089

National Live Stock and Meat Board
444 N. Michigan Avenue
Chicago, IL 60611
(312) 467-5520

National Onion Association
One Greeley National Plaza, Suite 510
Greeley, CO 80631
(303) 353-5895

National Pasta Association
2101 Wilson Blvd., Suite 920
Arlington, VA 22201
(703) 841-0818

National Perishable Transportation
Association
P.O. Box 3021
Oak Park, IL 60603
(312) 524-1020

National Peanut Council
1500 King Street, Suite 301
Alexandria, VA 22314
(703) 838-9500

National Potato Council
9085 East Mineral Circle, Suite 155
Englewood, CO 80112
(303) 790-1141

National Potato Promotion Board
1385 S. Colorado Boulevard
Denver, CO 80222
(303) 758-7783

National Seasoning Manufacturers
Association
701 S. County Line Road
Hinsdale, IL 60521
(312) 323-6693

National Sugar Brokers Association
One World Trade Center, Suite 1927
New York, NY 10048
(212) 432-0813

National Soft Drink Association
1101 16th Street, N.W.
Washington, D.C. 20036-4877
(202) 463-6732

National Wholesale Druggists Association
105 Oronoco Street
Alexandria, VA 22314
(703) 684-6400

Natural Product Broker Association
4720 Lincoln Boulevard, Suite 331
Marina del Rey, CA 90292
(213) 827-8771

Paper Bag Institute
505 White Plains Road
Tarrytown, NY 10591
(914) 631-0909

Peanut Butter and Nut Processors Association
9005 Congressional Court
Potomac, MD 20854
(301) 365-4080

Pet Food Institute
1101 Connecticut Avenue, N.W., Suite 700
Washington, DC 20036
(202) 857-1120

Pickle Packers International
Box 606
St. Charles, IL 60174
(708) 584-8950

Plastic Bag Institute
505 White Plains Road
Tarrytown, NY 10591
(914) 631-0909

Popcorn Institute
111 E. Wacker Drive
Chicago, IL 60601
(312) 644-6610

Potato Association of America
University of Wisconsin
Hancock Research Station
Hancock, WI 54943
(715) 249-5712

Private Label Manufacturing Association
41 East 42nd Street
New York, NY 10017
(212) 972-3131

Produce Marketing Association
1500 Casho Mill Road
P.O. Box 6036
Newark, DE 19714-6036
(302) 738-7100

Retail Bakers of America
6525 Belcrest Road, Suite 250
Hyattsville, MD 20782-2003
(301) 277-0990

Rice Council of America
Box 740123
Houston, TX 77274
(713) 270-6691

Salad Manufacturers Association
2971 Flowers Road South, Suite 204
Atlanta, GA 30341
(404) 452-0660

Snack Food Association
1711 King Street, Suite 1
Alexandria, VA 22314
(703) 836-4500

Soap and Detergent Association
475 Park Avenue South
New York, NY 10016
(212) 725-1262

Soy Protein Council
1255 23rd Street, N.W.
Washington, DC 20037
(202) 467-6610

Soyfoods Association of America
P.O. Box 920
Bar Harbor, ME 04609
(207) 288-9419

Sugar Association
1101 15th Street, N.W., Suite 600
Washington, DC 20005
(202) 785-1122

United Food and Commercial Worker International Union
1775 K Street, N.W.
Washington, DC 20006
(202) 223-3111

United Fresh Fruit and Vegetable Association
727 North Washington Street
Alexandria, VA 22314
(703) 836-3410

Video Software Dealers Association
3 Eves Drive
Suite 307
Marlton, NJ 08053
(609) 596-8500

Wine and Spirit Wholesalers of America
1023 15th Street, N.W., 4th Floor
Washington, D.C. 20005
(202) 371-9792

Source: National Trade and Professional Associations of the United States
26th Edition, 1991
Columbia Books Inc., Washington, D.C.

Please Note: Although there are many more organizations who should be included in this section, limited space doesn't allow us to list all of them. Therefore, if you need more information please contact:

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1212 New York Avenue, N.W., Suite 230
Washington, D.C. 20005
(202) 898-0662